EVALUATION OF USE OF
LIBRARY SERVICES & TECHNOLOGY
ACT FUNDING IN MISSOURI
1998-2002

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I. Executive Summary

BACKGROUND:

The staff of the Missouri State Library undertook an evaluation of the effectiveness and impact of the use of LSTA funding in the state of Missouri during the grant periods of Federal FY1998 through 2002. The objective was to provide an assessment of the overall impact of the funding in meeting needs identified in the Missouri Five Year Plan for the use of LSTA Funds FY1998-2003. Emphasis was on Missouri's three tier approach to use of LSTA funds: Library Development and Wolfner Library Programs; Statewide Projects; and Competitive Grants to Libraries. In addition, a four part in-depth evaluation addressing LSTA funded technology and targeted services was conducted: the Basic Equipment Grant Program; the Adaptive Equipment Grant Program; Senior Services; and Training Efforts.

OVERVIEW AND OVERALL ASSESSMENT:

Based on information available in the Missouri State Library LSTA documents, associated reports from grantees over the period covered by this evaluation, and other sources of information – the annual Statistical Reports, *CHARTING MISSOURI'S LIBRARY FUTURE INTO THE NEW CENTURY: A Progress Report,* group discussions within the library community (including users of library services), mail and telephone surveys, and training participant evaluations and post evaluations – assessment was made of the extent to which and how successfully the three sets of goals and priorities designated in the Missouri Five Year Plan were implemented:)1 **Technology and Information Access; 2) Targeting Library and Information Services; and 3) Overarching Goals.** State Library programming and projects were analyzed by relationship to the goals under each of these three sets.

1. Technology and Information Access: Admittedly, this group of goals includes easily measurable outcomes. However, the assessment clearly indicates the Missouri State Library has done an excellent job in meeting most of the Technology and Information Access goals and priorities. Partly because of pre-existing and steady state government support for information technologies, the State Library has been able to form a partnership of federal, state and local funds to make great strides in automation and Internet access for public and academic libraries, in particular, and in the extension of those services to their clients. This has been accomplished through State Library staff support, statewide projects, and competitive grants. In addition, LSTA funding has been used to develop and support electronic connections between libraries, interlibrary cooperation, and partnerships with other entities to provide a network of information for the citizens of the state. Finally, LSTA funding has played a vital role in bringing continuing education opportunities to library staffs to ensure that they have sufficient skills for accessing information through electronic networks both to provide effective information resources for users, and to educate them in its use and availability.

2. Targeting Library and Information Services: These are ongoing goals, and therefore more difficult to measure for achievement levels. However, the assessment shows substantial progress towards meeting them. The State Library used all three components of the 1998-2002 LSTA Program to address this set of goals: Library Development and Wolfner staff activities; statewide programs; and competitive grants. Priority was given to reaching people who have disabilities and other service barriers through the Wolfner Library, the Adaptive

Equipment Program, and grants to the Departments of Mental Health and Corrections; through literacy projects and programming; and projects and programming directed to children's and senior services. Three of these areas are included in Tier II in-depth evaluation. Another ongoing statewide project -- Marketing Missouri Libraries – has served to increase public awareness of targeted library services.

   3. Overarching Goals: When the Five Year Plan was written, there was recognition that the themes of staff training and leadership and cooperation among libraries ran throughout the other two sets of goals. Consequently, goals directed specifically towards these two themes were included in the Plan, with a needs assessment conducted to determine continuing education and training needs. Training needs have been addressed through an ongoing statewide program for Continuing Education, directed by a staff consultant in that area, with participation by the State Library consultants in Literacy and Youth and Senior Services. One major component of this Program has been the Summer Institute, included in Tier II in-depth evaluation. Most technology training and many of the Leadership and Cooperation goals were addressed through the competitive Library Cooperation Grant Program. While a number of the individual projects were successful in meeting training and cooperation goals, there were problems with the Grant Program itself, which proved to be less successful than statewide projects and programming that addressed training and cooperation goals. Indeed, most of the State Library's Lessons Learned from the assessment, previous progress assessments, and preparation of the new Five Year Plan center on training and cooperation issues, as discussed in the assessment.

TIER II IN-DEPTH EVALUATIONS

   Basic Equipment Grant Program: From 1997 – 2001, Basic Equipment grants totaling $4,178,913 were awarded to 124 public libraries. The program funded PC's and other sophisticated equipment, as well as basic office equipment. This Program grew out of the needs for technology expressed by the library community in 18 public forums conducted in preparation for the LSTA Five Year Plan and for a broader document, *CHARTING MISSOURI'S LIBRARY FUTURE INTO THE NEW CENTURY* (1997), and in forums conducted for evaluating progress in Spring 2001.   Including state and locally funded programs, the number of PC's owned by Missouri public libraries increased ten-fold during this period. This Program increased the public library PC infrastructure by 23% during the report period. Only 104, 532 Missourians now live in districts not served by this Program (this excludes one very large, well funded district which has not needed to participate in the Program). This Program has enabled small libraries to offer the same resources as the six largest library systems in the state, which serve 75% of the population. Without these resources, the State Library could not have served all Missouri libraries in its attempts to meet and address other Five Year Plan goals and priorities. Consequently, the Basic Equipment Program may have been the most effective use of LSTA funds during the assessment period.

   Adaptive Equipment Grant Program: In 1999-2000, 68 Adaptive Equipment grants totaling $595,389 were awarded to 68 public libraries to assist library users with special physical needs. This program grew out of the Basic Equipment program, when State Library staff noticed that only two libraries had applied for adaptive equipment during the first two years of the program, and were puzzled as to why crucial Targeted Services were not being addressed by the larger program. A closer look at those two applications revealed that substantial research was required to determine the types and kinds of equipment best suited for library use by people with special needs. Consequently, the State Library staff consulted with the Wolfner Library staff to research and develop an application which included a package of information about the list of products selected for applicants to choose from and request. Based upon the number of

responses to the original call for grants and the results of a retrospective grantee survey conducted for this assessment, the State Library is including Adaptive Equipment grants in its Spring 2002 Call for Grants, with an updated set of guidelines and product selection. The major impact of this project has been to enhance the impact of the Basic Equipment Program and ensure that Missourians with disabilities have access to modern library service.

Library Services for Seniors: Because of the "graying of Missouri" discussed in the demographics section of the assessment, the State Library has emphasized this Targeted Services area, with success. It has been addressed with Statewide Projects, including publication of *Services for Seniors: A Resource Manual for Missouri Libraries* (March 2002), which has attracted national interest. Regional workshops were held in December 2001 to introduce the manual to libraries, and more are planned for Fall 2002. Services for Seniors has also been added to the Summer Institute curriculum. Attention to senior services also resulted in some of the more successful Library Cooperation grants, bringing school libraries into partnership with public libraries and community agencies serving seniors to provide computer training. In some cases this has continued with local support. The outcomes have been to increase and expand senior usage of public libraries, and to increase self esteem and confidence among Missouri Seniors because of their increased knowledge and skills.

Training Efforts: This section of the assessment covers Summer Institute, Literacy Gatherings, and Grants for Training, including Library Cooperation Training Grants and Show-Me-Steps Grants. This is the assessment area where many if not most of the State Library's Lessons Learned can be found, along with some progress in recognizing problems and planning programming to ensure more effective training for Missouri library directors, trustees, and paraprofessionals. One of the successes in this area is the State Library's ongoing commitment to training, having recognized at the beginning of the Five Year Plan the national crisis in library staffing. Fewer people are entering the field, jobs once filled by librarians are now being re-defined and assigned to untrained support staff, and the new technologies require extensive training for them to be effectively used. The major Lesson Learned is that training efforts have not been planned and designed to measure outcomes. We can report outputs, but have no reliable basis on which to draw conclusions as to how well trainees have been trained.

II. Overview of Missouri Five Year State Plan: 1998 – 2002 and use of LSTA funds from Federal FY 1998 – 2002.

A. Introduction

1. Demographics

The Missouri Five Year State Plan for the use of LSTA Funds identified several important demographic trends for consideration in setting priorities:

- Growth in the southern areas of the state, population loss in other areas
- Significant growth in persons age 65 and over
- Significant adult literacy concerns
- Distinct areas of high poverty rates, in both urban and rural areas

The 2000 Census confirmed many of these trends, and identified some new ones.

- Growth and loss -- Overall, Missouri experienced a 9.3 percent growth in population between 1990 and 2000. Out of 114 counties in the state, 96 gained population. Growth was most significant in suburban areas and in the Ozarks region in the southwest part of the state. Christian County in the Ozarks experienced a 66 percent increase in population during the past decade, making it 32nd out of 3,141 counties in the United States in terms of percentage growth. The only areas of the state where there was a pattern of population loss was the City of St. Louis, northern counties which have traditionally been farming areas, and part of the Bootheel in the extreme southeast corner of the state.
- Growth in persons aged 65 and over – There has been a 6% increase in this group. But with respect to general aging of the population, those Missourians aged 45 – 54 grew 41.9% between 1990 and 2000.
- Significant adult literacy concerns -- Literacy Investment for Tomorrow (LIFT) identifies at least 17% of English-speaking Missourians who score in the lowest level of literacy proficiency. Twenty-eight percent of adult Missourians do not have a high school diploma or equivalency certificate. Nearly 50% of adults on public assistance do not have a high school diploma or General Education Diploma. The foreign language population of Missouri, immigrants who are not fully literate in English, is growing. The Hispanic/Latino population also represents significant in-migration for the state. Census Bureau figures show the Hispanic population in Missouri nearly doubled over the past 10 years, growing from 60,429 in 1990 to 118,592 in 2000, and representing a total growth of 58,663 people. The Hispanic population now represents over two percent of the state's population and continues to grow rapidly. Although the City of St. Louis continued a trend of population loss that began after World War II, the loss was less than it had been in the past fifty years, bolstered significantly by over 30,000 recent immigrants from Bosnia. This ethnic group now accounts for nearly 10 percent of the population of the city and represents one of the fastest-growing populations in the state. These factors are concerns for Missouri's development in a high-tech society.

- Areas of high poverty rates in both urban and rural areas -- Comparatively high rates of poverty are associated with all of the aforementioned areas, both rural and urban, where population is decreasing.

2. Status of Libraries

Some major elements of library status in Missouri are identified in this table:

	1997		2001	
Library	Number	Population served	Number	Population served
Public	141	4,928,325	170	5,093,723
Academic	91	273,279	97	512,497
School	525 systems	883,327	525	894,843
Special	162	N/A	105	N/A
TOTAL	919		897	

In 1997, 430,000 rural Missourians had no access to public library services. This was about 8.5% of the total population of 5,116,901. Twenty-six counties had no countywide service, but may have had municipal libraries or special districts. Seven counties had no tax-supported service, but may have had volunteer or subscription libraries. Four of those counties were in major growth areas.

In 2001, the number of Missourians without access to public library services – 501,488 -- is larger than in 1997, but the percentage – 9% -- is nearly equal. The number of counties with no tax-supported library service has decreased to four. However, it is of concern that two of these counties are in high growth areas. The number of counties without countywide service has increased to 28, as three previously unserved counties have established service to at least part of the county. A map showing counties with library service, partial service, or no service is found at Appendix 1.

B. Overview of Missouri's LSTA program & Development of Missouri Five Year Plan for the use of LSTA Funds 1998-2003

1. Role of Secretary's Council and State Library Staff

The Secretary's Council on Library Development was established in 1996 to discuss and recommend public policy for Missouri libraries. The council includes elected officials, librarians, library trustees, educators, and citizens. The State Librarian and Library Development staff works with the council to direct the use of LSTA funds to achieve the goals identified in the Missouri Five Year Plan. Major policy issues and guidelines for the LSTA Grants Program are also brought forward for their consideration. The council has also reviewed statewide plans for library services for seniors, continuing education, education programs for public library trustees, and library marketing.

2. 3-tier approach to use of the funds

Each June the Secretary's Council has reviewed the plan for use of LSTA funds. The funds are allocated in three major portions:
  1) Federal funds for statewide library services through Library Development and Wolfner Library programs, as appropriated by the Missouri legislature. The

staff and activities supported by these funds provide the foundation for accomplishing most of the statewide projects

2) Statewide projects targeted toward specific goals of the plan
3) Subgrants to libraries, also targeted to the goals of the plan.

a) Library Development and Wolfner Library Programs

Library Development staff provided guidance and development for several statewide projects during this Five year Plan. In some cases the staff served as chair of the committee implementing the project. In other cases, staff members provided oversight for a vendor chosen to implement a project. Funds were also used for publications to help libraries learn about best practices and current opportunities, such as the monthly newsletter, *Newsline,* and the annual publication of the statistical report and directory.

Wolfner Library for the Blind and Physically Handicapped used LSTA funds to improve services to the over 18,000 Missourians who are unable to read standard printed materials due to a visual or physical disability. LSTA funds allow The Wolfner Library to have needed staff to inspect book and machines, to help in receiving of new books and to proof read Braille. LSTA funds enabled The Wolfner Library to purchase needed Braille and talking books, paid in part for the communications cost of a toll free number for Wolfner users, and paid local phone costs for Newsline, a telephone newspaper service.

b) Statewide Projects

Missouri has used statewide projects to work toward broad goals involving participation of libraries of all sizes and types. Statewide projects have been used for planning initiatives, such as the Statewide Digitization Committee and Senior Services Plan, for provision of statewide services, such as the Statewide Reference Center and OCLC Group Access Service, and for training for library staff. A project abstract and proposed funding allocation are presented to the Secretary's Council for approval each year. Expenditures for statewide projects ranged from 13% to 34% of program expenditures each year, as shown in the table below:

Fiscal Year	Total grant expenditures	Statewide project expenditures	Percent of expenditures
1998	$2,119,381	$341,898	16%
1999	$2,757,956	$358,597	13%
2000	$2,572,324	$437,282	17%
2001	$2,011,102	$690,969	34%
Total	$9,461,063	$1,828,746	19%

From FY1998 – 2000, nine statewide projects were conducted, increasing to seventeen in FY2001. Six projects continued throughout the period:

- Statewide Reference Center,
- OCLC Group Access for Interlibrary Loan,
- Telecommunications Consulting for Public Libraries,
- Continuing Education and Training
- Technology and Mental Health Education,
- Marketing Library Services.

The others are Public Library Standards Implementation, Leadership Momentum, Building Library Knowledge, Library Services for Seniors, School Libraries Study, Cooperative Grants Replication, Institutional Grants, Videoconferencing Network, the Statewide Digitization Plan, Bridging the Gap, and Focus on Literacy.

c) Competitive Grants to Libraries

A variety of subgrant programs were offered to libraries during this period to meet the goals of the Five Year Plan. They were announced by mail, email, fax, and on the Secretary of State's website. A chronology can be found in Appendix 2. Each of these programs will be discussed more fully under the appropriate program goals:

Basic Equipment: provided funds to help public libraries meet the goal to have the computer and other equipment to meet national standards

Adaptive Equipment: grew out of the Basic Equipment program, to help public libraries extend access to persons with physical disabilities.

Desktop Videoconferencing: also grew out of the Basic Equipment grant program, as a first step in building communication among libraries using the Internet for interactive video.

Public Reference Desk Computers: provided funds to help public libraries acquire the Gates Library Program staff computer, to help libraries develop public training projects using these PCs.

Library Cooperation: for cooperative projects involving several libraries or other partnering agencies. Projects could be targeted to one of five areas: information access; services for children and youth; services for seniors; literacy; training for staff, trustees, and citizens.

After School Connections: a targeted program that grew out of the Library Cooperation grant program, to further develop projects to serve at-risk youth.

English as a Second Language Conversation Partners Groups: a second targeted program to grow out of the Library Cooperation grant program, to develop literacy projects in libraries for non-English speakers.

Show Me Steps to Career Development: for assistance to individuals in developing library-related skills

Planning for Standards: to help public libraries conduct activities needed to produce the plans and policies required in *Missouri Public Library Standards.*

Libraries Helping Libraries: to improve library service by sharing expertise between libraries

Bring in an Expert: this program was an outgrowth of the Libraries Helping Libraries, modeled on the successful program in Illinois.

Digital Imaging: to develop model programs to demonstrate use of the standards and guidelines for practice developed by the Statewide Digitization Committee.

III. Tier I review of Missouri Five Year State Plan goals and findings on implementation.

The Missouri Five Year State Plan designates three sets of goals:
1) **Technology and information access**
2) **Targeting library and information services**
3) **Overarching goals.**

The following review of goals will include discussion of statewide projects and library grant projects conducted in each area.

A. Technology and Information Access Goals

Nine goals were designated to address information access and electronic linkages:

Goal 1: All libraries in the state have automated their operations and information delivery in a manner appropriate to their library's size and function and are linked to other libraries through their automated systems.

Goal 2: All libraries in the state have access to the Internet and extend that access to their clients.

Goal 3: Missouri libraries have cost-effective access to electronic services for educational, social, and information needs.

Goal 4: Missouri library staffs have sufficient skills for accessing information through electronic networks to provide effective information resources for users.

Goal 5: Missourians have ready access to the resources of academic, public, institution, school and special libraries through interlibrary cooperation and electronic connections.

Goal 6: Missouri libraries create partnerships with other entities to provide a network of information for the citizens of the state.

Goal 7: Libraries have affordable telecommunications and sufficient bandwidth to receive and deliver effective library services electronically.

Goal 8: People know about the library and information services available to them and know how to access them.

Goal 9: Libraries are aware of best ways to use new technology, exemplary programs, and good ideas and include them in service planning.

Goal 1: All libraries in the state have automated their operations and information delivery in a manner appropriate to their library's size and function and are linked to other libraries through their automated systems.

Missouri has been able to make great strides toward achieving this goal for academic and public libraries. Because state, local, and federal funds have worked in partnership toward achieving a new level of library automation, some discussion of the use of state and local funds is necessary to provide the context for the State Library's use of LSTA funding to meet this goal.

State and Local Funds:

In 1999, the Missouri General Assembly approved $10.2 million over three years to finance start-up costs for a statewide online catalog for academic libraries. The Common Library Platform creates a "virtual collection" of approximately 14 million items in the libraries of Missouri's colleges and universities. It enables direct borrowing of library materials by students and faculty at 50 public and private academic libraries across the state. By mid-2002, 11 automated systems or "clusters" will be linked together through a separate union catalog system. Participating libraries receive daily delivery of materials through a courier service, and

borrowers receive requested materials within 24 to 48 hours. Ongoing costs for the system are shared through state appropriations and fees paid by the local colleges.

Beginning with a $3 million capital improvements appropriation in 1996, grants have been available for public libraries for retrospective conversion, and new or upgraded library automation systems. The first state appropriation was followed in 1999 and 2000 with $786,426 each year. All projects require a 25% local match from the public library. Grant-funded projects are required to adhere to national standards such as USMARC, TCP/IP, and Z39.50.

Smaller libraries face a number of challenges in trying to automate. These include the relative lack of automated systems that are affordable for small libraries, shrinking populations in library tax districts, and the lack of support or understanding of the need for automation among library trustees. Costs for automated library systems also tend to take up a larger percentage of overall budgets for smaller libraries, making the decision to move forward with automation more difficult. Ongoing licensing & maintenance costs have an equal or greater impact than the start-up costs on libraries' decision to automate.

Despite these challenges, improvements in library services due to these grants have benefited more than 75 percent of public libraries in Missouri. From January 1997 to December 2001, a total of 88 grants from state funds were made to 61 libraries. Only fourteen of these libraries had been previously automated. Public libraries with automated systems meeting standards has grown from 15 in 1997 to 70 in 2002. Three new library automation consortia were established through these grants, resulting in increased opportunities for resource sharing and cooperative activities among those libraries.

As a result, 3,834,343 Library users, 81 percent of all library users in Missouri, have received new or improved automated library services. Another sixteen percent of library users in Missouri use libraries that have automated services without state grant funds, leaving only about 3% of users yet to be reached by automated library services.

LSTA funding:

A Library Development Consultant, supported through federal funds, administers the program. The consultant works with libraries as they research and plan their projects, advising on available options. Particularly with small libraries, the consultant advises on methods for retrospective conversion to ensure a quality database will result from the project. For many of these libraries, a retrospective conversion project has required the first serious weeding of their collections in many years. This past year, the consultant contacted and made personal visits to many of the remaining libraries that had not yet automated, to encourage them to begin the process.

Further, while the state grant funds were sufficient to provide basic system hardware and software, it did not cover all automation needs. In some cases libraries needed to replace substantial numbers of dumb terminals with PCs to operate upgraded software and allow Internet access. In others, Basic Equipment grants provided hardware to enhance the capability of the automation system, such as upgraded barcode scanners or additional catalog access. Sixteen LSTA Basic Equipment grants were used to fill this gap, for a total of $730,628 in awards to eight libraries and the Municipal Library Consortium of St. Louis County.

On the other hand, Missouri's school libraries are still a long way from meeting standards for library automation. This is a concern for the Missouri State Library because the Missouri

Five Year Plan Goals and Priorities encompass all Missouri Libraries (see Technology Goals above). Missouri's standards call for school libraries to "include an electronic catalog and circulation system which facilitates efficient information retrieval and school library media center management." While most school libraries have some type of automated system, some of them are still DOS-based systems, using partial MARC records. Even in the larger school districts, each library's automation system is self-contained, with no district-wide library catalog.

A study using LSTA funds was designed in 2000 using the school districts in Cass County as a basis to determine the best options for cataloging and automation systems for school libraries, and to determine whether shared automation systems have applications for Missouri Libraries. The findings of the study were not encouraging: although the school districts have willing school library professionals, information technology and connectivity to resource-sharing networks were not up to standard service levels. Budgets are uneven, and network speeds and capacity are often unable to support current needs. Many workstations are not able to support WWW services. Cass County school libraries are not using standards for information technology, access, resource sharing and cataloging. Local school districts would need to greatly increase their funding for school library technology to implement an automation system.

This finding spurred the State Library, Department of Elementary and Secondary Education, and the Missouri Association of School Librarians to conduct a further study of the status of school library services statewide. A joint committee began work on this project in fall 2001. At this time, an RFP is under development for the study. It is hoped a better picture of the status of school libraries will help in making plans and finding funding for improvement of school library services.

Goal 2: All libraries in the state have access to the Internet and extend that access to their clients.

Missouri was fortunate to have early state level support for telecommunications and Internet access. In 1990, The Missouri Research and Education Network (MOREnet) was established to provide an agency to coordinate the telecommunications backbone, software and training for Internet access for higher education, public schools, public libraries, and state agencies.

In 1995, the Missouri Secretary of State's office secured core budget funding of $800,000 to provide Internet access, backbone and network services and technical services to the state's tax-supported libraries – the Remote Electronic Access for Libraries Project (REAL). In 1996, an additional $500,000 was added for shared electronic resources (information databases) available to the entire MOREnet community. In 1999, the REAL Program core budget appropriations were increased to $2 million. This steady support from state legislators has provided a secure foundation on which Missouri public libraries could develop and expand access to Internet resources for their patrons.

In the meantime, the LSTA Basic Equipment grants from the State Library played a significant role in expanding Internet access to public libraries. From 1997 to 2001, the number of PC's owned by Missouri Public Libraries increased from 523 PCs in 135 public libraries to 5,121 PCs in 148 public libraries, a nearly ten-fold increase. Nearly one-quarter of these PCs were purchased with funds from Basic Equipment grants. **As the REAL project moved from a mix of dial-up and dedicated connections to nearly all dedicated lines, MOREnet implemented a requirement of two computers on a local area network for participation in the REAL project. The State Library supported and encouraged libraries to move in this**

direction by making computers available through the Basic Equipment grant program.
(See Part IV Tier II discussion for more information about the Basic Equipment Program).

Goal 3: Missouri libraries have cost-effective access to electronic services for educational, social, and information needs.

State funds are the primary source for meeting this goal in Missouri. Since 1996, the state appropriation for libraries has included funding for providing access to an increasing number of online databases. These have included citation and full-text access to over 1000 magazines and journals, full-text of two major Missouri metropolitan newspapers, online encyclopedias, business reference sources, health information, and in-depth reference content for the core curriculum areas of Literature, History, Biographies, Science, and Social Studies. From 1998 to 2001 the number of searches of online reference materials increased from 1.4 million to 2.1 million. Local public and school libraries pay a participation fee to participate in these services. For public libraries, the fee varies from $250 per year for the smallest libraries to $6000 per year for the largest libraries. LSTA funding supports the State Library staff member who works with MOREnet on the provision of these services.

Goal 4: Missouri library staffs have sufficient skills for accessing information through electronic networks to provide effective information resources for users.

The Library Services and Technology Act grant program has played a vital role in bringing continuing education opportunities to library staffs and governing bodies on two levels: statewide events coordinated by the State Library and grants for training awarded to individuals, local libraries or library agencies. (See Part IV Tier II discussion for more information).

The Library Skills Summer Institute, the most ambitious State Library continuing education program, is an annual multi-day event that provides training for library staff without professional library degrees. Institute classes have included introductions to basic web searching in the Basic Skills class, as well as special half-day classes on planning for automation systems and advanced web searching.

The State Library has addressed the need for training library staff on Internet and database searching by using LSTA and state funds to provide access for public library staff to a variety of programs and organizations under an LSTA funded contract. The Missouri Library Network Corporation (MLNC) provides training on interlibrary loan using the OCLC ILL Service to public libraries subscribing for the first time. The MLNC workshops give basic instruction in cataloging and interlibrary loan procedures using OCLC's proprietary database and network. They also cover topics such as web page design and construction, digital imaging and metadata. Instruction is also offered on searching the OCLC bibliographic database WorldCat via the FirstSearch interface. When the FirstSearch statewide licensing program was rolled out in early 2001, a series of LSTA funded regional workshops were held around the state to ensure that every library participating in the project had adequate training at the outset.

The Missouri Research and Education Network (MOREnet), an administrative unit of the University of Missouri, also offers a wide variety of courses designed to help library staff develop competency with PC hardware, e-mail, web browsers and search engines. Web page design, HTML, Java scripting and programming are also taught. For network administrators, there are two complete tracks that provide certification in Novell and Microsoft NT local area

network administration. Library staffs are eligible for this training under the Remote Access for Libraries (REAL) Project contract between the State Library and MOREnet. This contract is funded via an appropriation from the Missouri state legislature.

Goal 5: Missourians have ready access to the resources of academic, public, institution, school and special libraries through interlibrary cooperation and electronic connections.

Since the mid-1990s, the State Library has encouraged interlibrary cooperation via the Interlibrary Loan Group Access program, in which the state used LSTA funds to pay for the first 100 loan transactions by public, academic, and special libraries. This program has played an important part in broadening the scope of resource sharing among Missouri libraries.

Beginning in 2001 and continuing throughout 2002, the State Library has been introducing component parts of its expanded program for resource sharing called Show-Me The World. Funded under LSTA, this program offers a suite of OCLC's electronic library services to public libraries. These services include a statewide license for FirstSearch, funding for libraries to set their retrospective holdings in WorldCat, a three-year state contract with OCLC that sets affordable pricing for libraries to purchase the CatExpress cataloging service, and provides almost a100% LSTA subsidy of Interlibrary Loan.

LSTA funds are also used to support a contract for a statewide reference service. This provides access to second-tier reference by a major urban public library reference center – the Kansas City Public Library. This service is available by telephone, fax and e-mail to all public libraries. From 1998 – 2001, the statewide reference center averaged 5,206 inquiries a year. Usage has dropped by 21% during that time, presumably because of wider availability of Internet access to reference sources. The State Library believes, however, that this service is still valuable because of the *quality* of information callers receive when they reach the Statewide Reference Center, which is staffed by reference librarians with an exhaustive bank of reference sources, both print and electronic. As the State Library prepares its new Five Year Plan, there is discussion of evaluating the Statewide Reference Center to answer questions posed by the drop in its usage.

The State Library has also used LSTA funds for a statewide project grant with the Missouri Library Network Corporation (MLNC) to develop a statewide digitization plan for Missouri's cultural heritage institutions -- libraries, archives, museums and historical societies. Preceded by various LSTA Library Cooperation Competitive grants to partnerships of libraries and other institutions that carried out digital imaging projects involving newspapers, maps, and other types of materials, the project includes a statewide planning committee and working groups drawn from all sectors of the cultural heritage community, an online database "clearinghouse" that collects and centralizes information about past, present, and planned digital imaging projects, and ultimately will have a web portal to a database of metadata on digital collections around the state and links to holdings in those collections.

After three months of research conducted by the LSTA grants consultant in charge of the Statewide Digitization project, the State Library began a pilot program in the summer of 2001, offering grant opportunities to libraries and cultural heritage partners for digital imaging grant projects that implement current standards and best practices in the selection, digital capture,

storage, and delivery of collections via the World Wide Web. Five projects were awarded, for nearly $70,000. The projects selected will provide models in the areas of selection, indexing, scanning, and metadata creation for future grant applicants.

Goal 6: Missouri libraries create partnerships with other entities to provide a network of information for the citizens of the state.

Both the LSTA Cooperation Competitive Grants and the Digital Imaging Grant programs promoted public libraries' partnering with other entities. These have included academic, special and school libraries, archives, museums, historical societies, and seniors' groups. For instance, the St. Louis Public Library partnered with Community Connections to enter local community information into a statewide database.

The REAL Program and training on effective use of Internet access helped public libraries get ready to participate in community information networks. With a $6 million appropriation from the Missouri General Assembly in 1996, the Missouri Express Project was established to create community information networks (CINs) across the state. A total of 23 CINs were established. The local public library is a leading member of each of these networks.

The State Library and the Missouri Public Library Directors also co-sponsored a State Partnership Grant application to the Bill and Melinda Gates Foundation for expansion of public access to information technologies. Approved in 1999, the grant will make possible further improvements in library automation. The Gates Library Program grant targets public libraries serving low-income communities and those reaching out to people who do not have access to computers and the Internet. Missouri's public libraries are receiving their computers and training in spring 2002. Partnering with the Gates Foundation and other private, non-profit and local governmental organizations is an important component of library service.

In recognition of this need, in 2001 the State Library created with state funds a position for a statewide and community partnerships consultant. This person works with libraries to prepare for the Gates grant program training and implementation sessions, as well as consulting generally on creating partnerships and networking in local communities. In addition, LSTA funds are being used at this time to allow libraries in the Gates Program to purchase additional Gates computers for Public Service Desk use. Sixty-one libraries applied and were funded.

Goal 7: Libraries have affordable telecommunications and sufficient bandwidth to receive and deliver effective library services electronically.

The Missouri Research and Educational Network (MOREnet) administers a high-capacity, high-speed, statewide telecommunications network in the State of Missouri. The budget for this network was more than $21 million in FY2001, and provides Internet access and statewide databases for Missouri's schools, higher education institutions, public libraries, and state government.   Since 1994, MOREnet staffs have worked with the State Library on the REAL Project, which enables public libraries to provide Internet services and online reference products to their users. The REAL Project is one of the most comprehensive Internet access programs in the country and has been singled out as an exemplary service in numerous articles and professional journals.

E-rate funding has been used to increase bandwidth at all levels of library use through MOREnet's discounts from the Federal Communications Commission's Schools and Libraries

Division on its Internet access charges. MORENet applies for the discount on behalf of all the schools and libraries it supports. The resulting program savings are used to increase and expand services for the libraries.

To help individual libraries and schools take advantage of the E-rate program for local charges, MOREnet's support services were enhanced by expansion of training and consulting on the application process. This service was funded with LSTA funds in partnership with the Missouri Department of Elementary and Secondary Education. MOREnet has provided consulting assistance to libraries filling out application forms, and has kept the State Librarian briefed on developments within the FCC and the E-Rate program.

Goal 8: People know about the library and information services available to them and know how to access them.

The State Library has encouraged libraries to foster better awareness of technology resources in a number of ways. The State Library encourages local libraries in promoting these services to their communities. All LSTA subgrant application forms routinely include a question asking, "How will the new equipment be promoted/advertised in your community?" A sample press release is included with the grant award packet. The grant reports require the library to show how the service was announced to the community, and tell how the community has reacted. The description in Tier II of the impact of the Basic Equipment grants will show the success of local libraries in promoting technology and information services in their communities.

Goal 9: Libraries are aware of best ways to use new technology, exemplary programs, and good ideas and include them in service planning.

Frequent emails, program announcements, and technical fliers from the State Library and from MOREnet help libraries to know about developments in information access and in current programs. Mailings from the State Library are supported through LSTA funds.

The State Library has encouraged libraries to do better technology planning by requiring submission of a technology plan from all participants in the REAL Project. Plans are also reviewed by the State Library as part of its role as technology plan coordinator for the E-rate program in Missouri. After technology plans are approved, they are valid for three years and must then be updated. Exemplary plans for small, medium and large libraries are posted on the MOREnet web site under the section for the REAL project.

Libraries are encouraged to include technology budgeting and planning by consultants for several areas at the State Library: the Technology & Bibliographic Services consultant, the Automation & Technology Consultant, and the LSTA Grants Officer. Newsline articles and briefs report on grant awards and highlight noteworthy technology projects so libraries can learn from their example.

Libraries have asked the State Library to do a better job of sharing results and lessons learned from the grant projects, so they can take advantage of this work. The new grant program for Digital Imaging includes providing forums for sharing the work and finding ways to replicate these models as part of the grant program design.

B. *Targeting Library Information and Services*

Five goals were written to address specific library service needs of Missouri citizens:

Goal 1: Library services and resources are accessible to all persons having difficulty in using a library due to the challenges of geography, institutional setting, individual disabilities, varying ability levels, literacy, or residence in an underserved area.

Goal 2: Library users develop effective library and information resources skills in both traditional and technology based environments.

Goal 3: People's cultural, educational, social, economic, health, or other specifically identified needs are addressed and met.

Goal 4. People know about the library and information services available to them and know how to access them.

Goal 5. Libraries are aware of best practices, exemplary programs and good ideas, and include them in service planning.

These are ongoing goals, and therefore more difficult to measure for achievement levels. The State Library used all three components of the 1998-2003 LSTA Program to address these goals – Library Development and Wolfner staff activities; statewide programs; and competitive grants. In addressing these goals, priority was given to reaching people who have disabilities through the Wolfner Library and adaptive equipment program; literacy projects and programming; and projects and programming directed and children's and senior services.

Goal 1 - Reaching people who have disabilities through the Wolfner Library and adaptive equipment program.

Wolfner Library for the Blind and Physically Handicapped used LSTA funds to contribute toward this goal by funding outreach and training programs. Exposure to innovative service programs of other libraries at conferences and workshops has lead directly to improved services. Conversion of popular recorded discs to more user friendly cassettes and the Wolfner expanded outreach program came as a result of recent staff attendance at a national conference. In addition, the LSTA support makes possible innovative activities such as an e-mail distribution list to patrons, family and friends, a *Recommended Readings* web site, and Missouri Web-Braille. The State Library also consulted with the Wolfner Library in development of the Adaptive Equipment Grant Program.

Goals 1 and 5 – Accessibility for patrons with special needs and library awareness of and inclusion in service plans of best practices, exemplary programs and good ideas: <u>Literacy Projects.</u>

The State Library has been involved with promoting library literacy activities since the early 1990s. With the increasing emphasis on family literacy, the State Library began offering "Family Nights at the Library," a program to help parents address children's reading development. The program was first offered with LSCA funds, but was converted to state funding in 1998. Local public libraries partner with community literacy agencies to develop program plans for their community.

The Library Development consultant charged with addressing literacy needs has focused on developing greater cooperation among agencies at the state and local level. She meets regularly with staff from Department of Elementary and Secondary Education (DESE), and has managed to develop accommodations for library-based programs in the DESE grant program.

Her close contact has fostered a greater awareness at the state level of the role libraries play in community literacy efforts. She also serves on the Missouri Family Literacy Initiative (MOFLI) Task Force, funded through a grant from the U.S. Dept. of Education. This task force, with members from many state agencies, was able to compare efforts and implement cooperative programs to support sustainable family literacy programs.

The State Library is the administering agent for state funding for basic operations of the Literacy Investment for Tomorrow (LIFT), the statewide literacy resource center. Through this regular contact and partnership, the State Library ensures library participation in training and outreach efforts of LIFT. LSTA funds have been used to cosponsor training programs and conferences developed by LIFT, to tailor programs to library interests and needs.

Local literacy resources and programs vary widely across the state. In response, the literacy consultant implemented a program of 'Literacy Gatherings' to foster cooperation among libraries and literacy providers in each region. Changes in state-funded adult education programs, the new GED test, the growing immigrant population and other trends make this an important time for gathering information, for networking, and for understanding the wide variety of literacy-related activities in Missouri libraries. Library staff and local literacy providers are invited to these meetings, held in 4-6 locations around the state each year. They have become important connection points for library staff and literacy providers to exchange ideas, trade best practices and tips, and inform the State Library of local situations and needs.

In addition to these personal meetings, in 2001, the State Library issued a survey to all public libraries and branch buildings to identify and collect information about library efforts and activities that represent intentional literacy programs. Responses were received from a little over one fourth of the libraries. It is likely these libraries have more active literacy related programs than the non-respondents. Here are some key findings from the libraries responding to the survey:
- 94% indicated literacy related groups use their facilities
- 58% said the library is a site for tutoring of some type
- 10% have meeting space used by groups
- 6% house adult education classes funded through DESE.
- 72% make referrals to literacy programs and local resources
- 56% are involved in collaborations with community agencies
- 86% of these libraries have low reading level materials, but only 46% of the libraries have specific new reader collections for adults
- Only a few have actual instructional materials for adults.
- Activities to help children develop adequate reading skills are the dominant literacy programming of these libraries.
- Staff and funding are at the top of the list of literacy program needs, followed by staff training and materials.

Library Cooperation grants were offered to help libraries with local literacy efforts. However, few libraries proposed projects in this area. Several projects to reach generally underserved areas, particularly in rural areas, listed literacy concerns as an impetus to their project. In 2001, a new grant program targeting non-English speaking immigrants, the English as a Second Language Conversation Partners Grant, was offered. Three applications were funded, and we are eager to read their evaluations, but these projects are just getting underway. These grants are being offered again in Spring 2002.

Goals 1, 3, 5 – Accessibility for patrons with special needs or barriers; specifically identified needs; and awareness of and inclusion in service plans of best practices, exemplary programs and good ideas: <u>Youth & Teen Services.</u>

Improvement of library services for children and teens has been an ongoing priority for the Missouri State Library. For the LSTA Program, the focus has been on training for library staff, fostering cooperation among school and public libraries, and some new statewide projects and grant programs for school libraries.

The 1998 statistical reports from public libraries showed all but 21 of the libraries offered some type of children's programs. Data was not collected on young adult programs until 1999. In 1999, 35 of 165 libraries responding to the survey reported providing young adult programs. (This includes a number of libraries that do not meet the requirements for state programs or LSTA grants.) The 2000 statistical survey report showed an increase to 45 of 149 libraries providing young adult programs. All six of the largest public libraries do provide young adult programs, while those not providing these programs tend to be smaller municipal or county libraries with few staff. Data from the 2001 survey report are not yet available.

Missouri's statewide children's summer reading program and the new teen summer reading program, begun in 2000, are produced using state funds. The Youth and Senior Services Consultant of the Library Development staff chairs the committees that produce these programs. For the new teen summer reading program, the committee developed a planning manual, poster, bookmarks, and PR ideas. LSTA funds were used to conduct five programs in fall 1999 to launch the teen summer reading program for summer 2000. These programs were very successful in encouraging library staffs around the state to build services and collections for their young adult populations. More than 4800 youth, age 12 to 18, participated in the first young adult reading program, and participation grew to 5,736 in 2001. In addition, the statistical survey showed an increase from 21% (1999) to 30% (2000) in the percentage of public libraries offering young adult programs.

Many librarians saw this as an opportunity to begin building their young adult audiences. The programs also spurred some creative responses to the need for a special space in the library for teens. One small library in a former bank converted the bank vault from magazine storage to a cozy teen reading center.

The Youth and Senior Services Consultant plans annual continuing education programs for library staff. A planning committee and public and school librarians jointly develop the program content. These programs help staff learn about issues, and get practical information on implementing successful services in new areas. Three statewide conferences were conducted during this assessment period. The first focused on school and public library cooperation, and brought together staff from 24 public libraries and 29 schools to address how collaborative efforts could help children develop a lifelong love of reading. In 1999, the topic of intergenerational programming in libraries drew together those serving youth and seniors. Youth at Risk was the focus of the 2000 conference, attended by 106 staff from 25 public libraries and 28 schools. Participant evaluations of these programs are consistently high, which is testimony to the work of the Consultant and planning committees to develop conferences with strong speakers and presentations.

In addition to these annual conferences, the Youth and Senior Services Consultant conducts regular regional workshops in four to six locations. These LSTA funded Trade Secrets

Workshops provide a forum for library staff serving youth in school and public libraries to network with colleagues about programming, services, and other issues. Staffs working in small libraries with limited resources have few opportunities to attend conferences that involve overnight stays or lengthy travel. The programs were held in the fall of 1998, 1999, and 2001. The 1998 and 2001 programs focused on a general exchange of programming, promotion, or service ideas and tips. The fall 1999 program served to launch the teen summer reading program. Attendance has ranged from 65 to 81 staff persons, predominantly from public libraries. As with the Literacy Gatherings, these programs provide an opportunity for the Library Development Consultant to share information about state programs and developments. As a result, eleven libraries developed grant applications for programs.

Another parallel to the literacy program is the low number of library cooperation grant applications directly related to youth services. Of the seven projects funded, four were in the St. Louis area. The After School Connections grant program, begun in fall 2001, was developed to provide libraries with a model program to reach out to underserved youth. These projects are also just getting underway in spring 2002, and are being re-offered in the Spring 2002 Call for Grants.

To build on the interest in improving services for teens that began with the Trade Secrets workshops in 1999, the Youth and Senior Services Consultant and a committee of young adult librarians are currently updating *Bridging the Gap: Young Adult Services in the Library*, with LSTA funds. The Missouri Library Association originally produced this manual in 1992. Producing a second edition will serve as a companion, supplement, and handbook for basic young adult services. The original manual was well received by libraries in Missouri and other states. The new manual is targeted for publication in fall 2002.

Goal 1: Accessibility for patrons with special needs or other challenges: <u>Additional Statewide and Library Cooperation grant projects.</u>

Two statewide projects used LSTA funds to improve library services for residents of state institutions. Each of them merited highlighting as exemplary programs in previous LSTA annual reports. These projects are good examples of the merit of cooperation among state agencies for common goals.

In 1998, using LSTA funds, the Mo. Department of Corrections created a professional library coordinator position. The coordinator has overseen strategic planning for all of the division's libraries, with special attention to the continuing education needs of library staff. Additional LSTA funding was provided for training and equipment under the supervision of the library coordinator. At the end of the three-year pilot, the Department of Corrections added the position to its staff funding. This is the first time within the Department of Corrections that a designated library professional has succeeded in setting up a coordinated program for all of the state corrections facilities.

Since 1997, the Missouri Department of Mental Health has used LSTA Library Cooperation funds to purchase computers for state-supported mental health facilities around the state. Computers with Internet access were placed in areas accessible by people with disabilities, their families, and support staff. Volunteers provided training for residents of the institutions. Evaluation of the use of the computers indicates their use has helped to reunite residents with

family members, to assist residents in developing interests beyond the institution, and to help family members find resources and information to assist them. The program implemented the computer access in phases, in several institutions each year. Mental Health Department staff indicate they are ready to move to a new phase in the program, focusing on staff and user training.

Four Library Cooperation grants were awarded to school and public libraries to extend service in generally underserved areas. Each program attempted to bring library services closer to the user, in some cases by opening school libraries to community patrons during after school and weekend periods. Staff from school and public libraries cooperated to operate the facilities and provide training in computer skills and Internet access. One such project in an economically challenged county – Learning for Life -- uses the school library as its public library and has been so successful in training citizens with computer skills that have helped them to find new employment that it was cited as an exemplary project in the State Library's 2001 Annual LSTA Report.

Goal 3: Meeting cultural, educational, social, economic, health and other library needs.

This has been a secondary goal of a number of the Library Cooperation grants, but the primary goal in only two of them up to 2001. The After School Connections grants were designed to help libraries design programs to meet this goal with young, at risk, users. The grants provided a project framework within which each library developed their own project. Five grants were awarded in the first round for FY2002. These grants will be monitored closely for progress and problems, so the lessons learned can be applied in future grant rounds.

Goal 4: Public Awareness of library services.

For this goal, a Statewide Marketing Task Force began work in 1998. The 17 members of the task force represented public, academic, school, and special libraries as well as several citizen members. They outlined a multi-year campaign to consist of three phases: research, continuing education, and promotional materials. *Missouri Libraries: Your Lifetime Connection* targets a broad audience and highlights the multiple roles of libraries throughout an individual's life.

To prepare for the campaign, the State Library contracted with the Center for Advanced Social Research (CASR) at the University of Missouri-Columbia to conduct a major statewide library awareness survey. The statewide telephone survey was conducted in September and October 1998. Altogether, 1,231 interviews were completed. The survey was developed to collect information on public access, usage of services, evaluation of staff and services, computer use, and reasons for using library services. Generally, the respondents indicated a generally high awareness of library services, and high valuation of the services received. They exhibited strong interest in libraries providing computers, Internet access, and literacy services. While most areas of library services, such as reference and programs for children received good satisfaction ratings, Internet and computer services and the computer skills of library staff received less favorable ratings. The survey findings helped task force members to determine the direction of the marketing campaign.

Highlights – Missourians' opinion of libraries
- 98% think libraries are important to their local communities
- 98% believe libraries are educational institutions
- 95% have access to a public library
- 85% of those surveyed have either visited or telephoned a library during the past year

- 77% believe libraries should offer Internet access
- 66% currently have a library card
- 60% of those surveyed used library services 12 times or more in the past year.

The State Library contracted with an advertising firm to develop the first kit of publicity materials featuring a new statewide logo developed to assist libraries with their marketing efforts. The kit included posters, clip art sheets and disk with the logo, postcards, a mouse pad, counter cards, bookmarks, and a booklet explaining their use. All school, public, and academic libraries in Missouri received a copy of the kit.

Continuing education is a key component of the campaign. In the spring of 1999, the State Library sponsored a statewide marketing conference featuring a nationally know authority on library marketing. Two series of regional workshops have also been conducted. "Essential Design Principles for Library Staff," conducted in fall 2000, focused on design of pieces for marketing the library's program. "Media Relations," conducted in Winter 2002, helped library staff understand how to work with media representatives, in good times and times of crisis.

As a further stage, the State Library is currently working with an advertising firm to develop radio spots that can be customized by the library, and other PR materials. Work is nearly complete on a library marketing manual, to be distributed to all libraries. The State Library will also want to repeat the general survey at a future date to determine outcomes of the marketing campaign and of other programs, such as training for library staff in computer use.

Goal 5: Promotion of best practices

The general services manuals mentioned previously -- *Library Services for Seniors*, *Bridging the Gap: Young Adult Services in the Library, Teen Summer Reading Program,* and the forthcoming manual for marketing library services -- are prime examples of the State Library's efforts to help libraries know about and use best practices. Workshops on these themes have coincided with the release of the manuals, to promote their use and help library staff understand their content.

Missouri Public Library Standards was distributed to libraries in 1999. Continuing education events for both library staff and trustees were planned to follow its distribution. Vacancies on the Library Development staff delayed timely planning of these activities. A Trustee Academy in February 2002 was designed to help trustees understand their basic roles as planners and policy makers for libraries. The Academy's registration was filled to capacity at 100 participants, with a waiting list of 43. Consequently, trustees and the Secretary's Council have requested the Academy be repeated again this fall (2002). The State Library also plans to repeat the event in several locations around the state.

In addition to these targeted publications, the State Library uses other regular publications to help libraries and trustees stay aware of Missouri library activities. *Newsline,* the State Library's monthly newsletter, is used to announce grant opportunities, continuing education events, and events in Missouri libraries. It also announces LSTA awards with project descriptions. The Missouri Library Statistical Report is published annually to help libraries see the scope of library programs.

C. Overarching Goals

At the time of writing the LSTA plan, there was recognition that the themes of staff training and leadership and cooperation among libraries ran throughout the technology and targeted services programs.

1. Training goals

Goal 1: Missouri library staffs and those who govern libraries have the knowledge and skills they need to effectively meet the library and information needs of Missouri's citizens.

Goal 2: People can access appropriate training when and where they need it, with costs shared by local, state, and federal funding.

a) Goal 1: Library staffs and governing boards have the knowledge and skills they need.

In 1997, the state librarian convened a Continuing Education Advisory Committee to address the training and continuing education needs of Missouri's library community. The committee developed a needs assessment survey which was distributed to public, school, academic, special, and institution library staffs, and to public library trustees. Approximately 2200 surveys were distributed with a 33% return rate. Technology was ranked the number one priority for continuing education and training by every type of library. Library automation was of primary concern to institution and school libraries, whereas electronic information was primary to public, academic and special libraries. The Internet consistently appeared in every survey group at various ranked levels. Reference and/or Administration appeared in every survey group as the remaining priority CE areas.

The Continuing Education committee developed a matrix of training needs based on the responses from the survey. The matrix outlined needs for training in technology, administration, resource access, and specialties such as youth services and reference. The high need for technology training was reinforced in fall 1998 when the Statewide Marketing Committee conducted a survey of the public to assess their perceptions of library service. In the survey questions about the overall knowledge of library staff, 41% surveyed rated staff knowledge excellent, with 46% rated staff knowledge good. However, on the question about computer skills of library staff, only 16% gave an excellent rating, 34% good, and 37% said they didn't know.

The committee recommended that continuing education and training be coordinated statewide with the State Library as the primary agent. In addition, the committee recommended that an education/training information clearinghouse and working group be established. In 1998, the Secretary's Council and the Secretary of State endorsed this plan. However, staff changes at the State Library impeded immediate implementation of many of the recommendations. A new Continuing Education Coordinator began work in late 2000. She has reviewed the plan, and will convene a new CE Committee to work to coordinate CE efforts among the several training providers in Missouri.

This new Continuing Education Committee will develop a comprehensive, statewide, continuing education plan. It will monitor current CE events, provide suggestions for the utilization of videoconferencing and distance learning, and assist in determining scope, role and

responsibility of various providers. The continuing education plan will focus on the design and delivery of content-consistent statewide training for personnel in Missouri's libraries and will encompass standards, competencies and changing focus areas.

The State Library continued to offer a variety of training opportunities for Missouri library staffs throughout the LSTA plan period. Some of these have been described under the sections on literacy efforts, youth services, and marketing library services. The largest program each year each year is Summer Institute, a weeklong program covering the basics of library operations for paraprofessional staff and directors of small public libraries who do not have a graduate library degree. Four to six classes are offered each summer, for approximately 120 participants. Many participants attend several summers in sequence to cover the full set of courses. **An in-depth evaluation of Summer Institute is part of the Tier II discussion in Part IV.**

As a complementary piece to the Continuing Education plan, a special plan was developed to focus on the education needs of library trustees. In 1998 the Secretary's Council and Secretary of State endorsed the plan titled *Trustees as Library Leaders: Charting Missouri's Future.* The plan outlined a multi-level approach to best meet the needs expressed by trustees. The plan proposed a six-part program: a statewide conference for trustees; regional workshops for trustees; a trustee manual; multi-media informational kits on subjects of interest; creation of a pool of trustee leaders to serve as trainers; and regular articles in the monthly newsletter.

The *Trustees as Library Leaders* program was kicked off with a one-day workshop in September 1998, "Building a Better Board Team." Attended by 73 trustees, the program focused on the basics of boardsmanship, working with the community and library director to provide excellent library service. This successful program was the only element implemented for the next two years, however, again due to staff vacancies. The program was revived in 2001 with the appointment of a new Library Administration Consultant. Once again, a statewide conference was chosen as the first piece. The Trustee Academy, held in February 2002, was attended by 100 enthusiastic trustees. The program covered the basics of the roles and responsibilities of library trustees, as determined by a planning committee composed of library trustees, library directors, and the Library Administration Consultant. This program was so well received the registration exceeded capacity, with a waiting list of 43, and there are plans to repeat the program as soon as a suitable date and arrangements can be found.

In 1997, the State Library and the University of Missouri School of Information Science and Learning Technologies (SISLT) formed a partnership to establish the Library Leadership Academy that builds on the professional library science degree and provides enhanced training in both leadership and management. Library directors and others with leadership potential, including public, school, special, and academic librarians have participated in three-day leadership academies in 1998, 1999, and 2000.

Evaluation of continuing education programs has consisted of rating forms filled out by participants at the close of the session. These most often included Likert scales to rate presentations, plus areas for comments on the program's quality and relevance, as well as suggestions for additional programs. Library Development staff has learned the importance of thorough work with presenters to ensure the desired content is covered in the program. However, staff continues to explore new ways to work with presenters to improve in this area. In addition, evaluations have been sent in several cases to program participants six weeks following the CE event, to assess their longer view of the program's content, and whether they

have been able to put it to use. **A follow-up survey of Summer Institute attendees will be discussed in the Tier II evaluation section**.

b) Goal 2: Bringing training to where people need it.

In the aforementioned Continuing Education needs assessment survey, travel distance was indicated as a primary limiter for participation in continuing education activities by virtually all survey groups. Of those surveyed, 50% said they would travel up to 50 miles for a training session; the other half were willing to travel up to 100 miles. Library trustees in particular expressed a preference for evening and Saturday programs. Based on these responses, the State Library has sponsored a number of regional continuing education programs. In many cases, these regional workshops were the first opportunity participants had to network with colleagues. Locations were chosen so that participants did not travel more than two hours to attend. Library Development staff have conducted several types of regional programs: Trade Secrets, a series of regional workshops for youth services staff; and Literacy Gatherings, informal meetings of librarians, educators, and representatives from community groups that provide literacy services. Regional workshops on marketing took place in winter 2000 and 2001 as part of the State Library's marketing campaign for Missouri libraries. The just released *Serving Seniors*: *A Resource Manual for Missouri Libraries* was introduced to public libraries in regional meetings in late 2001.

In conducting these regional workshops, Missouri library staffs have benefited from the willingness of local libraries to serve as host sites. This has helped to keep costs to a reasonable level, and also provides an opportunity for library staff to see other locations and get good ideas. Missouri's continuing education program has also benefited from the willingness of experienced and talented staff to share their expertise and develop interesting and lively presentations for these continuing education events. A disturbing participation pattern has been noted, in that libraries in Southeast Missouri have lower participation rates for all types of continuing education activities. This has been noted not only for State Library workshops, but also for programs conducted by the Missouri Library Network Corporation (MLNC) and MOREnet (Missouri Research and Education Network). It is not known whether this is due to the topics offered, the dates and/or locations of programs, or other factors. Further investigation will be made of staffs in these libraries to see if changes can be made in program approaches to better serve the needs of this part of the state.

One of the issues in accessibility is knowing when and where CE events are taking place. The State Library and other CE providers had long expressed a desire to have a centralized calendar for CE events. A Committee on Continuing Education was established at the 2000 Missouri Library Association Annual Conference. A top priority of this Committee was to create a Web-accessible calendar of free and fee-based training events of interests to librarians across the state.

The State Library CE Consultant was able to partner with this committee to construct a schema for the calendar, using software available to the State Library.   The calendar, with MOREnet formatting the database and the Secretary of State Office personnel formatting and uploading the web-accessible calendar was introduced onto the Secretary of State's web page in October of 2001. The calendar allows searching by type of activity, and also by location. Links are provided to the full workshop offerings of each CE provider.

The State Library is in the early stages of implementing a distance education program. Grants will soon be awarded for six videoconferencing sites, which will serve as the beginning of a statewide network. The telecommunications bandwidth for the network is available through the REAL Program and MOREnet, supported with state funding. For the operation of the videoconferencing network, the State Library will work in partnership with the library sites, continuing education providers, and MOREnet for the training and scheduling of appropriate content. The Continuing Education Coordinator is researching projects conducted by other states, and effective use of distance education. Several of the topics offered as regional workshops may lend themselves to the distance education format. This may also prove effective in reaching public library trustees.

2. Leadership and Cooperation goals

Goal 1: A strong partnership exists among all library service providers for the development of excellent library services

Goal 2: Libraries have strong partnerships with community and cultural organizations, state and local service agencies, literacy and education providers, and museums.

Goal 3: Libraries use available funds effectively to meet the needs of all Missourians.

Goal 1: A strong partnership exists among all library service providers for the development of excellent library services.

Significant developments have occurred during the first four years of the 1998-2003 Missouri FiveYear Plan to move Missouri libraries in the direction of this goal. The State Library has participated in many of these developments, as library staff serves on committees or advisory boards. In general, the State Library has encouraged open communication and joint planning among these library groups. Joint projects have mostly been confined to a single type of library, academic, public, school, or institution. State Library staff, particularly the State Librarian, often serve as the bridge for sharing information on project developments among the different types of libraries.

The development of the MOBIUS (Missouri Bibliographic Information User System) consortium for a statewide online catalog for academic libraries has set the standard for cooperation by instituting a shared library automation system for cataloging and direct patron borrowing. The consortium has brought together public and private four-year, two-year, technical and community college institutions into a shared system for improvement of library services. In FY2001 LSTA funds supported a statewide project to study electronic resources appropriate for sharing through the MOBIUS system. Some of the databases were licensed with MOBIUS member funds, while state funding is sought for more electronic resources.

The Missouri Library Network Corporation (MLNC), an affiliate of the OCLC Online Computer Library Center, is structured as a consortium of member libraries. MLNC has taken a leadership role in training for library staff, conducting the CatExpress pilot project, and coordinating a statewide committee on digitization planning.

The State Librarian attends meetings of the Missouri Library Association Executive Board, and the Legislative Committee. This participation strengthens the work of the association on library issues and advocacy. State Library staff also provides programs for the MLA

conference, and partners with MLA committees on joint projects such as the CE calendar and the Building Block Picture Book Award.

Public libraries have developed and strengthened several networking and partnering groups during this period. The Missouri Public Library Directors, has grown from a membership of about 35 in 1997 to approximately 75 active members. The growth in membership is partly due to use by the State Library of this forum for updating libraries about current issues, particularly LSTA program and E-rate funding. Regional groups have also flourished, growing from four in 1997 to seven in 2002. The new groups serve members in the southern portion of Missouri. The State Library also hosts regular meetings of the directors of large public libraries, and youth services coordinators of large public libraries. These groups support discussion of issues impacting those institutions, and result in cooperative program development. LSTA funding has supported these groups indirectly, through support of State Library general program work to develop libraries and participation by State Library staff in these meetings.

School libraries have a strong professional association for school librarians, the Missouri Association of School Librarians. The State Librarian attends meetings of the Executive Board, and regularly attends their conference. State Library staff provided several programs for the MASL conference. MASL, the State Library and the Department of Elementary and Secondary Education are currently working on a comprehensive study of school library services (see p 10 above). The three partners, with LSTA funds used for the State Library portion, jointly fund the study.

Goals 1 and 2: Role of Cooperation grants program

The Library Cooperation Grant program was conceived in 1998 as a way to link the competitive grant process for the technology and targeted services area goals with the leadership and cooperation goals. Libraries were required to partner with other libraries or community agencies for their proposed projects. The grant announcement encouraged applicants to reach new audiences, or provide increased access to library services. Grants were targeted for information access, services for children and youth, services for seniors, literacy, and training. All types of libraries were eligible for this program.

As illustrated by the following table, the number of applications received is quite small compared to the number of eligible applicants. In 1997, a total of 747 libraries of all types were eligible to apply. Public libraries had very high participation levels in the Basic Equipment grant program. The Library Cooperation grant program, however, inspired applications from only a small group of libraries and the library consortia. Three of the large public libraries tended to submit proposals in each call for applications. Only five projects were awarded to smaller public libraries. Only eight school libraries proposed successful projects. Two consortia, the Kansas City Metro Library Network and Missouri Library Network Corporation, made a total of 29 applications for training grants, 18 of which were awarded.

Library Cooperation Grant Applications by Type:

Type:	FY1998		FY1999		FY2000		FY2001		Totals	
	Awards	Not	Awards	Not	Awards	Not	Awards	Not	Awards	Not
Information Access	6	2	6	3	5	3	2	1	19	9
Underserved	0	0	3	0	3	0	1	0	7	0
Youth services	2	1	2	4	1	1	1	5	6	11
Seniors	4	0	7	0	2	1	0	0	13	1
Literacy	0	0	1	5	1	4	0	1	2	10
Training	8	0	15	0	7	10	2	11	32	13
Partnerships	0	0	0	0	0	0	1	0	1	0
Totals	20	3	34	12	19	19	7	18	**80**	**44**
Per cent									**64%**	**36%**

Upon examination of the pattern of grant applications received, a number of potential problems with the program were observed. The applications required development of a partnership with another library, or a community group. In some cases, this requirement could be met fairly easily, by involving library staff from neighboring institutions in planning a workshop or training project, for instance . But it was apparent from reading the applications that many of the proposed partnerships were nominal at best. Partners were often not truly involved in planning the project. Applications from school libraries would propose partnering with other parts of the school district structure, such as a high school library with an elementary school library, or with some other special program within the school.

The relative effort required to develop a program proposal appeared to be a deterrent to many libraries. Library staff at some medium to smaller libraries commented on not wanting to invest the time to write proposals that might not be funded, whereas larger public libraries have staff and resources to invest in developing these projects. Library staff also commented they were unsure what was allowed in each project.

As the review committee rated each group of applications, questions arose about project specifics, such as how much funding to allow for development of training curriculum, costs for substitute staff for library personnel, or technical issues for the information technology grants. To try to address these issues, the grant application was revised several times, each time adding more specific instructions and examples of eligible and ineligible items for funding.

The Secretary's Council on Library Development was asked to consider several policy issues arising from the Library Cooperation grant process. In May 1999, they discussed a group of questions related to funding of multi-year projects, replication of exemplary projects, use of LSTA funds for salaries for staff or for staff overtime, and how to address sustainability of projects. The Council's discussion led to changes in the application form and process to try to address these issues. Their decisions were also published in *Newsline.*

The Secretary's Council again discussed the Library Cooperation grants at the February, 2001 meeting. At this time, the State Librarian reviewed the most recent round of Library Cooperation grants from Fall 2000. Of the 16 applications, only two received good ratings and were awarded without reservations. The remaining grants were problematic, and questionable

as to whether or not they were Cooperation grants. School libraries in particular had difficulty reaching out to other libraries or community partners. However, the Council indicated their interest in continuing the Cooperative Grants Program. Staff was directed to better define the goals of each type of Cooperation grant, and to review the forms and explanations to give applicants a better understanding of how to apply for them.

Out of this discussion and review, staff began to develop projects with guidelines targeted toward specific program goals. In Fall 2001, new applications were released in several areas: Digital Imaging grants, to develop model programs in digitization;   After School Connections, for projects targeting at-risk youth; Conversation Partners, to develop literacy projects with non-English speakers; Planning for Standards, to help public libraries reach the Missouri Public Library Standards; and Reference Desk Computer Grants, to help public libraries acquire the Gates Library Program staff computer for development of user training. A new grant application for library training projects is still in the development stage.

Overall, the funded projects had limited success in developing sustainable partnerships for improvement of library services. Several projects targeted for training senior citizens have had lasting results, as noted in the Part IV. Tier II discussion of Senior Services. A review of the Library Cooperation grants for staff training is also found in Part IV Tier II section of this report. Perhaps one of the greater successes is the Library Cooperation grant for digital imaging projects, which provided some early experience that pointed the way towards forming a Statewide Digitization Committee to develop priorities, guidelines and standards for digitizing projects in Missouri.

Goal 3: Libraries use available funds effectively to meet the needs of all Missourians.

For this goal, the State Library looks at the use of LSTA funds in statewide programs and grant programs to meet the joint goals of the LSTA program and local library service program. In particular, grant programs are monitored for effective use of funds, beginning with the application process. On occasion, applicants are asked to make program changes to comply with federal regulations, and to strengthen project planning and development. In a few cases, funds have been added to projects to allow for use of professional assistance in conducting the grant project. Grantees are required to submit interim reports documenting progress, and to document expenditures of program funds. The LSTA Coordinator reviews these reports, contacts grantees with questions, and advises grantees on areas of problems or concerns. Final reports receive a similar review prior to signoff and transmission of the final grant payment.

IV. Tier II in-depth reviews

A. Basic Equipment Program

A BRIEF HISTORY:

From 1997 to 2001, 387 Basic Equipment grants totaling $4,178,913 were awarded to 124 public libraries. In addition to PC's, workstations, desktop videoconferencing equipment, projectors, scanners, microfilm scanners, CD-ROM changers, cameras, video cameras, security systems, digital reader/printers and comparable other sophisticated equipment, these grants also funded purchase of basic office equipment – copiers, typewriters, fax machines, and phone systems.

The Basic Equipment Program initially grew out of 18 public forums held throughout the state in 1996, in preparation for the *1998 – 2003 Missouri Five Year State Plan for the use of Library Services and Technology Act Funds*, and for a broader document, *CHARTING MISSOURI'S LIBRARY FUTURE INTO THE NEW CENTURY* (July 1997). That needs assessment gave the State Library a strong indication that Missouri Public Libraries, especially in the small to medium population based areas, lacked the basic equipment necessary to provide good service delivery. Further, it was clear that libraries wanted to keep up with technology and the improved information access and delivery that it provided, but lacked local funds to purchase new or replace or upgrade old, outdated equipment. As a consequence, Goals 1 and 2 of Goals and Priorities Related to Information Access and Electronic Linkages in the *1998-2003 Missouri Five Year State Plan* state that (1) "All libraries in the state have automated their operations and information delivery in a manner appropriate to their library's size and function and are linked to other libraries through their automated systems." And (2) "All libraries in the state have access to the Internet and extend that access to their clients." Accordingly, the first Activity to follow from those two goals is to "Provide basic equipment needed by public and other libraries to automate their operation and information delivery functions including access to the Internet and electronic information services."

The need for and value of the Basic Equipment Program was reinforced in the winter of 2000-2001, when the State Library conducted another series of library community forums, the "Under Construction Meetings," in order to assess the State Library's progress in meeting the priorities and goals of *CHARTING MISSOURI'S FUTURE. . . .* the result of which was a second major document, *CHARTING MISSOURI'S FUTURE. . . A PROGRESS REPORT* (March 2001). Libraries' top priority from those meetings was technology and information access, including the need for help in keeping current with technology through replacement of older hardware and software, and assistive technology for people who have disabilities.

IMPACT:

From baseline data in the August 2001 Statistical Report, staff determined that one measurable impact of five years of Basic Equipment grants was that this grant

program increased the PC infrastructure in Missouri public libraries by 23%. To wit: during this period, the number of PC's owned by Missouri Public Libraries increased from 523 PC's in 135 public libraries to 5,121 PC's in 148 public libraries, a nearly ten-fold increase. 1,037 of these PC's – 21% -- were purchased with funds from Basic Equipment grants. Further, a survey of the participation in this program reveals that only 317,439 Missourians live in a library district without Basic Equipment grant provided equipment: fifteen small municipal libraries, three rural county libraries, and one rural regional district. Of special note is that one additional district with no history of Basic Equipment program participation is the well funded St. Charles City-county district, which has had no need for these funds. Excluding them from the unserved population leaves only 104,532 Missourians living in districts not served by the Basic Equipment program.

To give further context to assessing the impact of the Basic Equipment program, six large systems serve 75% of Missouri's population. In these systems, Basic Equipment funds were used primarily to add public access PC's to their facilities. The more "medium" sized districts used the program to upgrade old equipment and to add PC's and other equipment to targeted service areas, such as Youth Services, within their system. For smaller systems, this program provided – in addition to their first PC's – basic office equipment. Also, as the REAL (Remote Electronic Access to Libraries) Project moved from a mix of dial-up and dedicated connections to nearly all dedicated lines, MOREnet implemented a basic requirement of two PC's on a local area network for participation in the REAL project. The State Library supported and encouraged all libraries to move in this directions by making PC's available through the Basic Equipment program.

In order to further assess the impact of Basic Equipment grants on recipient libraries --their staff, service levels, and patrons – State Library staff conducted two surveys. The first was to pull a random sample (13%) of applications to glean and benchmark common, perceived needs listed in applications . We found a total of nine, listed here in ascending order:
- Staff training
- Low income service area
- User training
- Internet access
- Targeted group service
- Enhancement of automation systems
- Increased patron base/need
- Low or no community access to equipment
- Replacement/outdated equipment

The second survey, mailed to all Basic Equipment grant recipients in March 2002, was to find out what needs were filled, in retrospect. 69% of recipients responded. One of the more interesting findings was that at the time of application, the most reported need was to replace old/outdated equipment , at 31%, with the next five common needs essentially tied at 12%. In contrast, the March 2002 survey revealed that internet access (23%), targeted group services (20%), and low or no community access to equipment (15%) were the most common needs being met with the granted basic equipment. With respect to use of the library for Internet and email access, we should note that in smaller

to medium sized communities, there was until recently little to no access to high speed, dedicated lines for home computers, and Missouri libraries were the first to have them in their respective communities, bringing users into their libraries to take advantage of those services.

When asked for outcomes upon library services and staff resulting from the addition of the granted equipment, 100% of the respondents reported significant improvements in levels of patron service and/or staff productivity. Thirteen respondents also reported staff changes in behavior, skills, and attitude as outcomes. From a larger library system which also services surrounding rural branches, these comments provide a representative summary of the impact of Basic Equipment grants upon library services:

"Technology has created many opportunities to enhance services and improve the dissemination of information. The computer hardware and other equipment provided to the Springfield-Greene County Library District through the Basic Equipment grants have enabled many advantages for customers in our service area and beyond. As a result, the Library is in a position to anticipate future needs; to create new services ahead of the demand; to be seen as an institution that offers "leading edge" electronic resources. [An] example:
- The first wide area network that was established using a Citrix server eliminated barriers to access that might have resulted from living in a rural area. It made it possible to access the same information at the Ash Grove branch that was available at the Main Library (the resource center for district at that time). . . .

"An important point to note is that the Basic Equipment projects have afforded opportunities to learn about the use of recent technologies as they apply to delivering library services. These projects, such as videoconferencing, also demonstrate to other organizations that the library is a good partner who is willing to move forward with a new concept that has the potential to improve services."

When asked for community outcomes resulting from the addition of the granted equipment, respondents reported the following changes/improvements:
- Behavior   #60   29%
- Attitudes   #40   19%
- Skills   #37   18%
- Knowledge   #52   25%
- Life condition/status   #18   9%

To put a human face on these outcomes, the reported changes in behavior reflect significant increases in the number and frequency of people now using the library. One respondent from a relatively small library commented that "If these pieces of equipment had odometers on them, they'd have about 100,000 miles on each of them. . . . Before we had all this equipment, we were a great place to check out a book. Since we have gotten into the technology world, our circulation has tripled, our in-the-door traffic has almost quadrupled and I've only had one complaint in the last four years. That complaint was 'why [sic] can't we get rid of all the technology and go back to being a great book place.'"

Changes in attitude reflect how people now regard their library as a community resource, as illustrated in the comments above, from the Springfield-Greene County Library System. And several respondents from smaller communities reported that they were the only division of city government to have even such basic equipment as fax machines and copiers; what a difference that had made to their police and fire departments and fiscal offices, for whom they also generate forms on their library PC's; and how grateful they were to the library for having been able to acquire equipment they could never have afforded to purchase, given their low revenue bases. On library even reported that the local medical community makes use of their CC TV's to read X-rays and charts. Changes in attitude also reflect increased self-esteem among patrons -- how targeted groups, especially the elderly and other low income patrons, now feel about using computers and their ability to learn how to use them.

Concurrently, changes in skills and knowledge reflect increased access to the Internet, user training and other targeted services. Predictably, respondents reported heavy use by children and families in school assignments; by elderly patrons in seeking health information and setting up email accounts; by their community Adult Basic Education classes; and – overwhelmingly and somewhat surprising to respondents – the use of this equipment for genealogical research. Indeed, a significant number of respondents reported user training as one of the unexpected and fortunate improvements in library services to their communities. And as noted above, 15% of responses, mostly from smaller library systems, emphasized that they were the only – or the only reliable -- public source of Internet access and related resources within their service area: "So often, recently, we've had patrons come in that could not get copies from the Office Supply store or the Post Office (both are out of order), and they are quickly reminded by community members of our services. . . Thank you for all you've done for this little library."

Changes in life condition or status fell into two basic categories. Some libraries reported that user training resulted in a significant number of households purchasing computers for their homes. Many more libraries, especially those reporting a low income and/or more isolated (rural) service area, reported use of the Internet, PC's, and basic office equipment for job searches, resume preparation, distance learning, and learning computer skills to qualify for better jobs. Several in economically depressed areas reported that people used library computer equipment and services to learn how to set up and operate home based businesses, including research on the software needed and training in its use.

To summarize the impact of the Basic Equipment Grants, here are comments from three more libraries, one relatively large, two small:

"Students are able to type reports, the general public have access to word processors in order to create resumes and apply for jobs. The machines have given those otherwise without access to word-processors the ability to complete homework more efficiently, apply for jobs to better their lives and increase their income. Access to automation for those who do not have the resources at home allows them to have a chance to 'keep up.'"

"I believe the basic equipment grant program has helped small libraries achieve the same resources as the larger ones to bridge the gap between the 'haves" and 'have-nots.'"

"The availability of the equipment purchased with the Basic Equipment funds has helped to bring the world to citizens who, otherwise, would not have the opportunities to leave this part of Missouri."

B. ADAPTIVE EQUIPMENT GRANTS PROGRAM

A BRIEF HISTORY:

In 1999 – 2000 the State Library awarded 68 Adaptive Equipment grants totaling $595,389 to 68 public libraries to assist library patrons with special physical needs. Throughout the 1997 – 1999 grant periods for Basic Equipment, adaptive equipment was listed as a fundable area, but only two libraries submitted applications that included this kind of equipment in their request, leaving the State Library staff puzzled as to why so few libraries were including adaptive equipment in their proposals. Upon examination of the two applications, it became apparent that these two libraries had done substantial research with their physically challenged constituencies and their support systems to determine the types and kinds of equipment that were regarded as best and the most helpful for library use.

Using the two aforementioned applications as a starting point, the State Library staff consulted with their colleagues at the Wolfner Library for the Blind and Physically Handicapped and, with their assistance, researched and developed a call for grants with guidelines and an application that included a package of information about the list of products selected for applicants to choose from and request. As a result, 50 public libraries applied for and received Adaptive Equipment grants during the first round, in 1999, and 18 more applied for and received grants in the second round, in 2000.   Based upon this response and the results of a post-evaluation survey conducted in January 2002 for this LSTA Evaluation, the State Library is including Adaptive Equipment grants in its Spring 2002 Call for Grants, with an updated set of guidelines and product selection, based on Library feedback from the January 2002 survey.

IMPACT:

The January 2002 Adaptive Equipment grant survey was sent to the 68 public libraries who had received grants in 1999 – 2000, with a list of what equipment they had been awarded. They were asked to tell us which of the equipment was still in use and, if not in use, why. They were also asked to report outcomes of having this equipment upon staff, patrons with special needs, and their communities. 46 libraries – 68% of those sent the survey – responded.

Because we have not asked grant recipients to track numbers and frequencies of usage by this targeted group, most of the response was anecdotal, but it was overwhelmingly positive. Respondents reported that having this equipment available significantly decreased the amount of staff time that had previously been spent assisting patrons with special needs, freeing them up for other work – a real boon to smaller libraries with staff who are already "stretched to the max," to quote one such librarian.

Most important was the reported outcome upon patrons with special needs. Many if not most respondents reported that beyond the question of simply being able to use the library in new ways because of the addition of special equipment – 19'' and 21'

monitors, screen magnification hardware and software, TTY's, stand alone reading machines, and closed circuit TV's – patrons with special needs were much more likely to use the library now because of being able to do so without having to ask for help:

"Out of the total population of Gentry County, these two groups [physically and developmentally disabled, and the elderly] comprise close to 35% of our patrons. Before this equipment grant, when we were requested for these services [sic] a staff member had to do the work for the individual. This required a great deal of staff time, *and was humiliating for the person making the request. These people spend a great deal of time and effort to be as self-sufficient as possible, and we wanted their library experience to aid them in this process, instead of serving as a reminder of their limitations* [emphasis added]."

Several libraries also reported surprise at the frequency and increase in use of special equipment which can be attributed to a major demographic shift in Missouri, as noted in our demographics section at the top of Part II: "'The graying of America' has also come to Gentry County." Libraries with adaptive equipment report that library use by the elderly in general has increased as a consequence of having these resources. Concurrently, they report a change in life condition/status characterized by an increase in self-esteem among this group from a resulting sense of empowerment and independence similar to that of physically and developmentally disabled patrons.

Community outcomes were a little more difficult to ascertain from survey respondents, who tended to report outcomes upon patrons with special needs, including the elderly, as community outcomes. But some libraries who do track usage did report an increased number of patrons with special needs following acquisition of adaptive equipment. And a few respondents reported, for instance, that local optometrists, audiologists and other professionals who work with physically and developmentally disabled people had called them for information about their equipment to determine its suitability/feasibility for purchase for home use, and to inform their clients about its addition to the other services provided by their local public library.

One unintended consequence of the addition of certain pieces of adaptive equipment to libraries was so frequently reported that we are compelled to report it here. Specifically, libraries reported that their CC TV's are being used as much by genealogists, collectors – especially coin and stamp collectors – and amateur historians as they are by physically handicapped patrons.

The survey also yielded valuable information about the pieces of equipment that had worked best, and those for which there was little demand or which were not user friendly. By and large, equipment that was not being used fell into the latter category. Some pieces had broken, and the library had either been unable to afford to replace them, or found that they were too easily broken – the joy stick mouse, for instance -- to make it cost effective to keep them available. One very large system, the St. Louis County Library, reported that screen enlargers, which they had expected to be "wildly popular," were so frequently being removed and misplaced by patrons in some of their branches that they finally just put them all in storage. On the other hand, the widely requested big key keyboards were simply not being used because the letters and characters on them are different and arranged differently from those on traditional keyboards. Libraries found that only developmentally disabled children are being trained to use them, so they were

of little help or sufficiently user unfriendly for many special needs patrons, especially the elderly and visually impaired, who otherwise would have benefited from their availability. As a consequence, the State Library dropped the big key keyboards from its list of fundable equipment in the Spring 2002 Call for Grants.

C. Targeted Goals: Library Services for Seniors

A BRIEF HISTORY:

In 1997 the State Library convened a Task Force on Library Services for Older Adults. Members of the task force included librarians and institutions and agencies that serve seniors. The major achievement of the task force was development of a report and recommendations for library services, which were adopted by the Secretary's Council on Library Development, and the Secretary of State.

The task force recommended a three-dimensional plan to strengthen and develop library services for Missouri seniors:

1) Target improvement of library service for seniors and recognize libraries that implement effective and innovative programs.
2) Make sure seniors get the message about library service in appealing ways and provide libraries with tools and training for marketing their services.
3) use federal and state grant funds to further the development of library services for seniors.

While the task force conducted a survey of public libraries to discover the types of services available to Missourians age 65 and older, the survey is not extensive enough to use as a baseline for comparison of later activity levels.

A first effort for implementation of the plan for senior library services was a conference on Intergenerational programming held in 1999. Intended for adult services and children's services library staff, the conference provided participants with an understanding of the aging process, the opportunity to explore the benefits of intergenerational programming for the community and the library, and an introduction to planning and implementing intergenerational programming. The conference had a total of 72 participants representing 21 public libraries and 7 schools. Participant evaluations gave the overall program high marks in meeting their expectations, with only one session receiving a 'good' rather than 'excellent' rating. No follow-up surveys have been conducted with the participants to see how many have implemented intergenerational programs in their libraries.

A more in-depth approach to learning about seniors and library services was provided through a four-day advanced course given as part of the Summer Institute program in 1999. Summer Institute is designed to develop core competency areas for library staff who do not have graduate library degrees. The Library Services for Seniors course included basic characteristics of seniors, an overview of the aging process, and development and marketing of library services appropriate for seniors.

The major focus of the program from 2000 to 2002 has been development of a manual for library services for seniors. A consulting firm was contracted to develop the material according to an outline developed by the State Library. Upon review of the material submitted, the State Library determined more revisions were needed. The

manual was distributed to public libraries in March 2002. Five regional workshops were conducted in December 2001 to introduce the manual to libraries. More workshops are planned as a next phase of encouraging development of library services for seniors in Missouri.

Several school libraries partnered with local public libraries or community agencies to provide computer training for senior citizens with Library Cooperation grants. These projects opened school libraries for computer and Internet access for senior citizens during evening, afterschool, and weekend hours. The projects also provided scheduled classes and sometimes one-to-one assistance. These school libraries were located in small communities, with little computer access. In three cases, the response was so positive the grants were funded for subsequent projects. Three public libraries also conducted computer training for senior citizens with Library Cooperation grants. One multicounty public library used a Library Cooperation grant to team up with area senior centers to provide training accessing electronic resources to 16 senior volunteers, who in turn conducted training for seniors.

IMPACT:
A phone call to these grantees determined interest and success has continued beyond the grant period. While training has essentially ended at all of the school libraries, one still remains open one afternoon a week so seniors can use the computers provided with the grant. A High School grant site reported the attendance at the open computer access sessions has decreased as seniors in the area became comfortable with technology through the classes, and have purchased their own computers. This also occurred at two other high school grant sites for computer classes for seniors.

The public library grant sites have continued conducting computer classes for older adults, and are upgrading equipment with local funds. One county library uses volunteer trainers, all of whom are over fifty years old. They are currently using the computers at the senior center to help seniors e-file their income tax returns.

Each grant site had good tales to relate of seniors connecting with family, finding health information, researching hobbies and other interests. A few also related stories of younger persons (50's) who started learning to use computers at the library, and subsequently went on for more technical training and new job opportunities.

D. Training Efforts

1. SUMMER INSTITUTE

A BRIEF HISTORY:
Summer Institute provides an opportunity for library staff to learn the basics of librarianship or update their library skills. Instruction is suitable for employees who do not have a professional library degree. For a majority of years, two course series, *Basic Library Skills* and *Advanced Library Skills*, have been offered. The basic course series covers a range of library skills focused on public libraries in Missouri. Participants in the advanced series select one of four courses and one elective short course.

The Summer Institute began in the summer of 1990 and was held at Stephens College, Columbia, Missouri. Two instructors replicated a program held for 15 years in West Virginia. Only a basic class was offered and approximately 85 were in attendance. The Summer Institute grew in attendance numbers and courses offered. Basic class and four advanced classes came into being in 1994 and have provided a fairly consistent format.

Summer Institute Classes, 1997-2001

Year	Attended	Basic	Advanced	Advanced	Advanced	Advanced
1997	101	Yes	Reference	Young Adult Services	The Library and Your Community	
1998	110	Yes	Bibliographic Data		The Library and Your Community	Automation: Planning & Implementation
1999	103	Yes	Bibliographic Data	Services for Older Adults	Collection Development	Planning for Electronic Services
2000	118	Yes	Reference	Library Services to Children	Serving All Your Communities	Library Administration & Management
2001	125	Yes	Organizing Library Materials	Young Adult Services	Collection Development	User Friendly Libraries*

*The User-Friendly Libraries course included classes in customer service, serving diverse populations, ADA compliance, and building user-friendly libraries.

In addition to the basic and advanced courses, Summer Institute includes short workshop course(s) to augment other courses being taught in that particular Summer Institute and/or to address timely topics in the library world.   From five to eight short course workshops have been offered each year. Topics range from working with library boards to small scale digitizing projects. These courses also afford an opportunity for networking, as participants become acquainted with library staff in other courses besides their own. A list of the courses is included in Appendix 3.

IMPACT:
The following table represents year, total number of Summer Institute attendees and number of attendees from small, medium, large, and special libraries. Small libraries were public libraries with up to 6 full time employees, medium libraries were those public libraries with up to 100 full time employees, large libraries were those public libraries with over 100 full time employees, and special libraries were those libraries classified as academic, corrections, hospital, mental health institutions, and school for the deaf.

Year	Total	Small Libraries	Medium Libraries	Large Libraries	Special
1997	101	49 or 49%	28 or 28%	15 or 15%	9 or 8%
1998	110	45 or 41%	37 or 34%	11 or 10%	17 or 15%
1999	103	50 or 49%	31 or 30%	12 or 12%	10 or 10%
2000	118	55 or 47%	32 or 27%	13 or 11%	18 or 15%
2001	125	52 or 42%	32 or 26%	18 or 14%	23 or 18%

Participant evaluations have been in use throughout the history of the Institute. At the 2001 Summer Institute, 125 end-of-meeting evaluations were issued, 105 – 84% -- completed and returned. (see appendix 5).

Prior to 2001, post-Institute evaluations were not in use. Since that time evaluations have been issued to the participants 6 weeks after the Institute. 125 were sent after the 2001 Summer Institute, and 64 – 51% -- were returned.

Evaluations were also sent to participants of past years' Institutes. Questions were couched in terms intended to show the extent to which our program achieved its goals: upgraded library skills that proved beneficial to their respective libraries and communities.

LESSONS LEARNED:
Library work is becoming more complex and library staff roles are changing. Many librarians have reached retirement age, and library schools have closed, resulting in fewer graduate librarians to replace those retiring. Jobs that were formerly held by librarians have been re-classified and assigned to untrained support staff, who are expected to adjust quickly to a wider variety of skills demands and work situations. Educational and certification programs for library support staff (paraprofessionals) are offered in a variety of formats by many different kinds of organizations, such as area community colleges or vocational schools, but are not organized according to any common system of competency standards or institutional accreditation.

Professional literature asserts that there should be a unified system for recognition of competency standards to provide guidelines for library staffing concerns, to provide a general map for educational systems, and to help clarify the changing job descriptions of library support staff. At this time, however, there is no generally accepted profession-wide educational preparation for paraprofessionals. More characteristically, paraprofessional basic library education comes from on-the-job experience and from co-workers, supplemented by continuing education offerings.

Libraries are in need of paraprofessionals with increasingly sophisticated knowledge and skills and there is an escalating need for education and training. Understanding this and with the goal of achieving greater proficiency in libraries, the Missouri State Library has made a consistent effort to focus on evolving competencies and standardized curriculum. Over the years, this has been accomplished by making the **Basic** course track a standardized curriculum, which is now offered twice a year. The **Advanced** course track has also been working toward a standardized curriculum and

plans are now in place to make this a reality, evincing evolving competencies, upgrading of skills and consistent professional career development. Thus the Library Skills Institute has been altered to present the **Basic** course track (including technology classes from MOREnet) the **Advanced** course track, and **Evening** presentations. The short courses will be eliminated, thereby giving more class time for the **Advanced** courses. To assure coverage of timely topics, previously covered in **Short** courses, regional training will be considered for presentation throughout the State. In addition, attention is now being given to an adjunct technology training program to be conducted on a regional or online basis. As a planning and monitoring device, a team from the Missouri State Library will be chosen to evaluate class outlines and content on a yearly basis to determine if they reflect evolving competencies and standards.

2. LITERACY GATHERINGS

A BRIEF HISTORY:

Literacy Gatherings are designed to create occasions and establish contacts for networking about literacy efforts in Missouri libraries. Librarians gather in different libraries around the state to discuss literacy efforts and activities in Missouri libraries and the Missouri State Library uses these occasions to stay in touch with what is going on "in the trenches" and to distribute and collect information about literacy.

The first gathering was held in June of 1999 at the State Library. Nine people attended and special guests were two professionals from the Missouri Department of Elementary and Secondary Education's adult education program. Possibilities for collaboration with adult education were the main topic of conversation.

The first full round of literacy gatherings were hosted in the fall of 1999 with meetings at libraries in Sikeston, Seymour, Macon, Independence Twenty-eight people from libraries and other literacy organizations in Missouri attended. A spring round followed in early 2000 with meetings in Hannibal, High Ridge, Gentry County, Springfield, and Columbia with 41 librarians and literacy providers or supporters in attendance. At that time a newly-developed policy allowing Adult Education programs to do official tutoring in libraries was presented along with general material on Family Nights, summer reading programs, and discussion about what libraries are doing for literacy in Missouri and the many problems faced by communities that cannot sustain state funded programs.

The fall 2000 Literacy Gatherings were in Jefferson City, Kansas City-Westport, and Ferguson with 23 total attendees. Several representatives of volunteer adult education and literacy programs attended the Kansas City gathering and new contacts were made between public libraries and those programs. The lack of funding for alternative literacy efforts and what libraries and their partners might do to find funds was a lively topic at all meetings.

Forty-five people attended the Spring 2001 Library Literacy Gatherings held in Joplin, St Joseph, Jackson, Sikeston, and Barnhart. For the first time a gathering was hosted by a local literacy group in partnership with a library, the Pass the Power Adult Literacy program in St. Joseph. As at all gatherings librarians shared what they are doing

locally and the preliminary report on literacy services in Missouri libraries was discussed. The literacy strength of Missouri libraries is reported to be in children's services and local partnership efforts.

The Fall 2001 gatherings were in Marshall, Jackson, Springfield, Independence, and Kirkwood. Twenty-four people attended. The usual round of idea exchanges was held and the main topic of information distributed was the new GED test. Because of the statewide literacy conference in the spring of 2002 literacy gatherings were not held; it was hoped that librarians would attend that conference instead and the state library was a partner in the conference. Literacy Gatherings will resume in the fall of 2002.

Gatherings cost about $25 each plus the travel of the State Library Literacy consultant. Libraries do not charge to host the gatherings but they are reimbursed for light refreshments and other expenses. The state library stuffs a packet of informational materials about literacy topics and state library opportunities (including current LSTA grant possibilities) for each gathering. Each gathering includes an idea swap and question and answer session.

LESSONS LEARNED:
- Despite the lack of a steady funding stream for alternative literacy programs, libraries offer literacy backup services and efforts in a variety of creative ways.
- Requirements attached to ongoing funding streams for literacy often effectively exclude all but the largest libraries (which often have less need of the funding and are in communities already served by other agencies).
- Agencies that do have funding tend to want to control it and are not always open to partnerships with libraries.
- Successful partnerships are often as much a matter of personalities and personal relationship as of programs and outside influence.
- Personal commitment of an individual in a library rather than an institutional commitment or policy often becomes the crucial factor in whether a library has literacy efforts.
- Lack of staff, because of lack of funding, is the major problem that libraries face in offering literacy services.
- Many libraries hold events and have programs that are incidentally literacy oriented and only need be made more intentional to enhance literacy services to the community.
- Better ongoing communication and information dissemination about literacy is needed.
- The restriction on book purchases with LSTA money hampers using LSTA funds for literacy projects.
- Staff from small libraries will travel to a nearby large library for a meeting but staff of large libraries seldom travel an equal distance to a meeting hosted by a small library.

Plans for the future include:
- State Library creation and distribution of a literacy guide for libraries to extend the kind of information distribution offered at the literacy gatherings
- Adding more direct focus to the gatherings to ascertain if this will draw more participants

- Revision of the Literacy Continuum: In 1990 LSCA funds were used in the State Library of Iowa to do a report on emerging family literacy cooperative projects with libraries in several states. Included in this document was a "Continuum of Involvement in Family Literacy" that provided a framework for examining and assessing support of family literacy by a local library. Over a decade later both library service and family literacy have changed, society shows an increased concern for all literacy issues, and libraries can potentially be involved with a wider range of literacy efforts. One of the authors of the original study is now in Missouri and is developing a revision of the 1990 document which includes both general literacy programs and the changes in family literacy. A revised continuum has the potential to help all libraries look at literacy efforts and determine where library services might interface with what is being done in their communities. It will also offer a uniform framework from which to look at, plan, and evaluate literacy efforts in libraries. LSTA funding is being used for focus groups, involvement of Webster University and the State Literacy Resource Center (LIFT-Missouri), and editing and publications costs.

3. GRANTS FOR TRAINING

a. LIBRARY COOPERATION TRAINING GRANTS

A BRIEF HISTORY:
From 1997 –2000, local libraries were able to apply for grants to meet staff and public training needs through the Library Cooperation Grant program. The library was required to partner with other libraries, or with community or other agencies, in the planning and development of the training program. 32 grants were awarded to 10 different libraries or library consortia. Two library consortia, Kansas City Metropolitan Library Network (KCMLIN), and Missouri Library Network Corporation (MLNC) were awarded 18 grants to conduct several rounds of library staff training. In all, over 150 workshops were conducted, attended by over 2200 library staff. A list of the training grants and topics is found in Appendix (4).

The workshops conducted by KCMLIN and MLNC focused mainly on technology training for library staff. The KCMLIN Cybrarian Development program began under LSCA funding, and was continued for phases III and IV under LSTA funds. This program focused at first on basic computer literacy for library staffs, and later expanded into particular applications such as Power Point. While KCMLIN had a good participation in their workshops, the sessions were limited to the Kansas City metro area. The grant structure included salary support for a full-time CE coordinator for the KCMLIN. During the course of phases III and IV of the Cybrarian Development program, the State Library encouraged KCMLIN to look for ways to make the program less dependent on LSTA funds, particularly for staff support. KCMLIN was also encouraged to look for ways to expand the training program to a larger geographic area. Subsequent grants to KCMLIN were given for specific training sessions, and no longer included support for the CE coordinator's salary.

The workshops conducted by MLNC were held in 5 - 6 locations around the state. Some were developed by MLNC training staff, while others used contract presenters. Several workshops were developed in direct response to suggestions from libraries, as 'Insurance 101 for the Library Director.'

IMPACT:

As seen in the overall Library Cooperation grants, only a few libraries participated in the program. St. Louis Public Library conducted three rounds of training sessions, and made a good effort to include area libraries in the workshops. Grand River Library Cooperative, a cooperative partnership in northern Missouri used these grants for three rounds of paraprofessional training for library staff.

An examination of the reports from these projects revealed the following strengths and problem areas with these grants:

Strong points:
1) Existing partnerships and consortia can be used effectively to extend the reach of training to library staff who otherwise have difficulties attending CE sessions.
2) Replicating successful workshops from national presenters in new locations is an effective way to ensure success and keep development costs reasonable.
3) Small sessions allowing for hands-on training are preferred for learning new technologies.

Problem areas:

1) Decisions to conduct specific programs were not well explored, through quantifiable measures, before training programs were put into play.   No quantifiable pre-evaluation measures were taken to determine if goals and manner of instruction were appropriate

2) Pre-tests were not done at the beginning of training sessions. Trainers had multi-level audiences but, without pre-tests, no knowledge of different trainee levels. Consequently, measurement of learning at the end of the training did not reveal exactly what and how much participants had learned from the training experience.

3) Post-workshop evaluations were not conducted to determine whether or not and to what extent trainees were using newly acquired skills on the job.

4) Outcomes statements needed precision and to be tied to quantifiable indicators. Goals need to be tracked over time by grant administrators in order to justify the use of funds and for future program planning.

5) Only larger individual libraries were willing to invest the time to develop project plans and grant proposals for staff training.

LESSON LEARNED:

If the State Library decides to include training grants or contracts for training in its new Five Year Plan, a State Library committee should be formed to apply Outcomes Based Evaluation principles in program planning, RFP's, and training grant applications.

b. SHOW-ME-STEPS GRANTS

A BRIEF HISTORY:
   Show-Me-Steps to Career Development is a continuing education program for Missouri library personnel and public library trustees available through the Library Services & Technology Act. Through this program, the State Library provides financial assistance for participation by individual library staff and public library trustees in continuing education and training opportunities when local funds cannot finance the entire cost.   The program was conceived as a way to supplement continuing education offerings in the state by allowing local libraries to choose training events that matched their particular needs, even if offered in another state or by a nonlibrary training provider. The library is required to provide a 25% match, to encourage libraries to include funding for continuing education activities in their budgets.

Chronology and Summary of Show-Me-Steps Grants

Fiscal Year	Total Awards	Events attended	Awarded	Public Library	School Library	Academic Library	Corrections Library	Special Library
1998	17	3	$5,158	13	3	0	1	0
1999	27	12	$9,289	22	4	1	0	0
2000	41	17	$17,912	24	8	9	0	0
2001	39	16	$18,088	19	9	10	0	1
2002	30	14	$19,646	10	9	10	0	1

IMPACT:
   These grants allow staff to partake in continuing education experiences to meet unique needs in their library area. For example, a librarian in southwest Missouri used a Show-Me Steps grant to attend a Reforma Conference held in Florida. She was eager to learn how to serve the many new Hispanic members of her county, who had immigrated to the area to work in meat packing plants.

   Reviews of required Evaluative Reports submitted by grantees within 30 days after the CE event, indicate that the overwhelming majority of meetings, workshops, trainings, and courses were considered by the participants to be germane and of considerable benefit to their own employment situation, professional development, and general work environment.

LESSONS LEARNED:
   In addition to the Evaluative Report, an additional, Outcome Based designed report needs to be submitted by the grantee within 6 – 8 weeks of the event to determine changes in the institution that can be attributed to the grantee's training.

   More effort needs to be made to encourage Public Library Trustees to use Show-Me-Steps grants for trustee training. Beyond the *per se* benefits of the training for the trustee, the assumption is that their experience will lead to their realizing the value of CE training, and to incorporate it into library budgets, and policies and procedures.

V. Lessons Learned

Lessons learned have been integrated into the State Library's implementation of the Five Year Plan, as reported in this document. Therefore, they have been incorporated into the narrative, as appropriate. The following is a summary of those findings, followed by a brief discussion of what was found when the evaluators asked for feedback from two important influencers: The Secretary's Council and Missouri public library directors.

Most of the lessons learned were in implementation of the Overarching Goals of Training and Leadership and Cooperation.

A. Training

The State Library recognized early on the need for offering training to trustees and people who work in libraries, especially non-degreed librarians working in smaller libraries, paraprofessionals, and those in all libraries who were responsible for using and training others in the new technologies. Consequently, the State Library formed a statewide Continuing Education Committee to determine the areas where training was most needed, and produce a Continuing Education Plan. In conducting this assessment and working on the new Five Year Plan, staff determined that implementation is incomplete at this point. The only area which has been coordinated statewide, for instance, is for technology training. The rest have been divided between activities conducted by the State Library, such as Summer Institute, and competitive grants. The two major lessons learned from evaluating these projects and programs is that they have not been coordinated and planned to determine outcomes, nor was the need for many of them adequately established in advance.

Another lesson learned is that programs like Summer Institute need to be designed around competencies, so participants can earn CEU's from them. At this time, however, there is no generally accepted profession-wide educational preparation for paraprofessionals. More characteristically, paraprofessional basic library education comes from on-the-job experience and from co-workers, supplemented by continuing education offerings, such as those which have been provided through State Library projects and supported through Show-Me-Steps grants. As a consequence, the State Library's Continuing Education Consultant has re-formed the statewide Continuing Education Committee.. This new committee will develop a comprehensive, statewide, continuing education plan. It will monitor current CE events, provide suggestions for the utilization of videoconferencing and distance learning, and assist in determining scope, role and responsibility of various providers. The continuing education plan will focus on the design and delivery of content-consistent statewide training for personnel in Missouri's libraries and will encompass standards, competencies and changing focus areas.

B. Leadership and Cooperation

In implementing the Five Year Plan and conducting this assessment, it is apparent that the State Library has played a major role in moving Missouri libraries towards meeting Goal 1, "A strong partnership exists among all library service providers for the development of excellent library services." The State Librarian has served as the bridge between different types of libraries in sharing information about project developments within individual types of libraries. The development of the MOBIUS consortium has set the standard for cooperation, for instance, among academic libraries. LSTA funding has

supported MLNC in taking a leadership role in training for library staff, conducting the CatExpress pilot project and coordinating a statewide committee on digitization planning. The State Librarian, the staff and other LSTA funded efforts have played pivotal roles in the Missouri Library Association, the Missouri Public Library Directors and other regional groups, which have flourished during the period of this assessment. State Library staff research, leadership, programming, and program development in literacy and youth and senior services have fostered cooperation and partnerships between libraries and other community groups.

Another major lesson learned in implementing all three goals in this area is that competitive Library Cooperation grants did not for the most part effectively serve to foster strong partnerships and cooperation among libraries and between libraries and other community groups either in training (see above) or in targeted service areas. Few libraries participated, even after the program was revised following Secretary's Council input and suggestions for change. Applications were weak, for a variety of reasons: partnerships were nominal, and applications from school libraries would propose partnering with other parts of the school district structure, for instance. Also, the relative effort required to develop a program proposal appeared to be a deterrent to many libraries, especially the small to medium sized, who do not have a development staff in place. Overall, the funded projects had limited success in development of sustainable partnerships for improvement of library services, although several projects targeted for training senior citizens have had lasting results, as discussed in the Tier II section of this document.

As a result, the State Library staff has developed projects with guidelines targeted toward specific programming goals, which were offered in the Fall 2001, so it is too soon to tell if they will have successful outcomes.

C. The Secretary's Council and Missouri Public Library Directors (MPLD)

As part of this evaluation, feedback was requested from these two important State Library "influencers." As described in the following description of how the assessment was conducted, they were asked to address a series of questions in forums facilitated by respective neutral parties, without State Library staff present.

The Council feels they play an important role in the LSTA Program. They are pleased with the job staff does in giving them information they need in order to make policy decisions and recommendations. They would, however, appreciate receiving information between the quarterly Council meetings. They would also like to have grant coordinators share good project outcomes with them along with the challenges. And they expressed an interest in the State Library providing more support for grant application writers. (see appendix 6). It should be noted that the new LSTA Coordinator, hired in November 2001 concurs with this suggestion, and will begin to conduct training for library staff and trustees as part of the Continuing Education and Planning and Standards programming in Fall 2002.

The MPLD discussion participants find the text of messages and grant guidelines usually clear, and like the use of email in communicating them. However, they did have suggestions for improving the email processes being used by the State Library, and those changes have been made. They think the grant process is generally timely, but suggested

staggered deadlines for different kinds of grant applications, which has been implemented in the Spring 2002 Call for Grants. They also would like more information on who is reviewing applications and would like to be able to fill out applications and reports online, which is not yet possible on the State Library web site, and original signatures are also required on most grant paperwork. The main complaint was one with which the State Library heartily agrees, but is powerless to do anything about: the statewide accounting system that the State instituted two years ago. It is remarkably user unfriendly, especially for grants and payment processing, and a system upgrade has not been completed. IMLS drawdown guidelines also create problems in working with this system. Discussion participants also expressed frustration at the effect of staff turnover and vacancies on grants processing. As remarked upon earlier, a new, full time LSTA Coordinator/grants officer was hired November 2002 and is committed to making changes in these areas as needed and possible (see appendix 7).

VI. Brief Review of Evaluation Process:

A. Who was involved?

1. Role of Secretary's Council on Library Development

The Secretary's Council on Library Development has been involved throughout the evaluation process. They were briefed on the IMLS requirements for the evaluation, and the specific plan proposed for Missouri's evaluation. As the evaluation proceeded, they were provided with updates, and asked for comments and reaction to findings. At the December 2001 meeting, they were asked to discuss their role in the LSTA program. The Council was asked if they wished to review the evaluation report prior to its submission, and they decided they would accept the final report as prepared by State Library staff.

2. Role of State Library staff

State Library staff served as the chief evaluators, under the direction of the State Librarian and Library Development Director. A committee of the Library Development Director, LSTA Coordinator, two Library Development consultants, and a Librarian from the Wolfner Library for the Blind and Physically Handicapped outlined the actual process, compiled the data, and wrote the evaluation report. The Reference Services Director served as facilitator for the evaluation discussion with Secretary's Council.

3. Role of library community participants

The library community provided input for the evaluation in a variety of ways. The Missouri Public Library Directors participated in a discussion session on the grant administration process. Library staff responded to mail surveys for the Basic Equipment and Adaptive Equipment grant programs, and to Summer Institute participants. Library staffs were contacted by phone for discussion of the impact of the Seniors Services grants.

B. How was the evaluation conducted?

The evaluation used several methods, as determined by the evaluation committee. Plans to use an outside evaluator were dropped when the bid process for services was delayed by the state purchasing department past the point of usefulness. The committee used a number of available source materials, including *CHARTING MISSOURI'S LIBRARY FUTURE. . . . A Progress Report*; statistics compiled for budget requests or FSCS reports; LSTA Annual Reports; applications and reports from library grantees; lists of awards; and evaluation forms from continuing education sessions. These documents are cited within the report. New information was also sought from grantees and program participants. As discussed above, these included:

- Mail survey of Basic Equipment and Adaptive Equipment grantees
- Mail survey of Summer Institute participants
- Phone survey of Library Cooperation Grants for Seniors Services grantees
- Discussion forum with Missouri Public Library Directors
- Discussion forum with Secretary's Council on Library Development

Appendix 1 – Service map of Missouri

Appendix 2 – Chronology of Competitive Grants

	Grant type:	Eligible libraries:	# of awards
FY1998			
January	Basic Equipment	Public libraries	51
	Library Cooperation	All, with required partners	10
	Show-Me Steps	all	19
	Libraries Helping Libraries	all	
FY1999			
July,98	Basic Equipment	Public libraries	53
	Library Cooperation	All	20
	Show-Me Steps	all	12
January 99	Basic Equipment	Public libraries	59
	Library Cooperation	All	20
	Show-Me Steps	All	16
August 99	Adaptive Equipment	Public libraries	51
	Desktop videoconferencing	Public libraries	11
FY2000			
September 99	Basic Equipment	Public Libraries	61
	Library Cooperation	All	8
	Show-Me Steps		12
	Adaptive Equipment	Public libraries	10
January 00	Basic Equipment	Public Libraries	65
	Library Cooperation	All	12
	Show-Me Steps	All	27
FY2001			
September 00	Basic Equipment	Public Libraries	54
	Library Cooperation	All	4
	Show-Me Steps	All	25
March 01	Basic Equipment	Public libraries	44
	Bring in an Expert	All	
	Show-Me Steps	All	15
FY2002			
August 01	Digital Imaging	All, with restrictions	
September 01	After School Connections	Public libraries	
	Conversation Partners	Public libraries	
	Show-Me Steps	All	3
	Videoconferencing	Public libraries	
December 01	Planning for Standards	Public libraries	
	Grants for Gates reference computers	Public libraries	
	Show-Me Steps	All	25

Appendix 3.   Summer Institute Short Courses

Year	Short	Short	Short	Short	Short	Short
1997	Basics of Retrospective Conversion	Book Repair Workshop	Customer Service Telephone Skills	Working with Library Boards	Book Discussion Groups	Demystifying Dewey Decimal Classification
1997	Human Resource Issues in Libraries	RFPs and Evaluating Vendors	Telecom, Talk, Swap & Shop			
1998	Presentation Skills	Grant Writing Basics	At Risk Youth & Families	Preservation Measures in Disaster Situations I & II	Acquisition Overview	GPC Access
1998	Marketing Your Library					
1999	Getting the Most From your online catalog	The Gates Initiative	Disability Awareness & Community Inclusion	Never take it for Granted	Library Aesthetics	Small Libraries Seminar
1999	Census 2000 Is Counting on You	Maximizing Youth Collections				
2000		Seniors Writing Life Stories	Filtering Issues in Libraries	Literacy in Infancy & Childhood	Small Scale Digitization Projects	Small Libraries Seminar
2001		Provide Service & Market Your Library with Online Census Info.	Readers' Advisory	Serving Home Schoolers	Filter Properties in Libraries	Small Libraries Seminar

Appendix 4. Training grant spreadsheet

Year	Amount	Grantee	Topic
1998	$2,800	Grand River Library Consortium	staff teamwork
1998	$30,260	KCMLIN	Cybrarian training, I
1998	$12,145	KCMLIN	Cybrarian training II
1998	$4,263	MLNC	staff -ILL
1998	$4,147	MLNC	manage website
1998	$1,600	Polk County	Internet
1999	$2,500	Grand River Lib. Consor.	Conflict resolution for library staff
1999	$1,800	Jefferson County	Ready for 2000
1999	$43,368	KCMLIN	Cybrarian IV
1999	$8,999	Lucy James Elem Sch	Partners for Reading Success
1999	$5,525	McDonald County	Computer Lab assistants training
1999	$17,176	MLNC	Internet content workshops
1999	$7,000	MLNC	Bibliographic Basics
1999	$5,300	MLNC	Librarians as Internet Trainers
1999	$2,750	MLNC	Copyright Law & Library
1999	$5,030	MLNC	Bibliographic Basics II
1999	$4,545	MLNC	Cataloging Internet Resources
1999	$5,710	South School Lib	More Books in More Hands
1999	$2,000	Springfield-Greene	Using Literature with Young Children
1999	$3,230	St. Louis Public	Serving Students After School
1999	$15,413	St. Louis Public	MO-EFF
2000	$6,830	Grand River	Basic computer, Internet
2000	$4,200	KCMLIN	Basic Computer workshop
2000	$4,220	KCMLIN	PowerPoint
2000	$5,060	MLNC	Automation basics
2000	$4,865	MLNC	Book Preservation
2000	$3,895	MLNC	Library Insurance
2000	$5,375	MLNC	Emergency Preparednes
2001	$2,050	MLNC	Preserving Historic Records
2001	$10,350	St. Louis Public	Serving Special Populations

totals $232,406

Appendix 5.a.

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ADVANCED COURSE PRE-EVALUATION
SUMMER INSTITUTE 2002

</div>

II. What course have you selected?_____

1. What prompted you to take this training?

2. How familiar are you with the subject?

3. What other training in this subject have you received?

4. What is your biggest challenge in «course topic»?

5. To be of help to you, what topics/skills should this course focus on?

6. What would you like the instructor to know when planning this course?

7. How will you measure the success of the course?

Appendix 5.b.

Advanced Course Evaluation
Missouri State Library
2002 Summer Institute

Your evaluation responses are valuable to us! We will use the information that you provide to improve future Summer Institutes.

Course Title:

- ❑ Reference Services
- ❑ Library Services for Older Adults
- ❑ Organizing Library Materials
- ❑ User Friendly Libraries

	Excellent	Good	Average	Poor	Very Poor
Course Content and Preparation	5	4	3	2	1
Handouts and Audiovisual Material	5	4	3	2	1
Presenter	5	4	3	2	1

What interested me most in the course was:_____

What interested me least in the course was:_____

To improve future courses I would suggest:_____

As a result of this course, I will be able to use the following skills in my work:_____

Please use the reverse side for additional comments.

Post Summer Institute Evaluation (2002)

What course did you attend?_____

1.   What has happened in the last six weeks that evolved from your attendance at Summer Institute 2002? Examples might include the planning or beginning of new projects, any problems that have been discovered or solved, and/or new ways of looking at present job activities.

2.   If you have not been able to apply your experiences from Summer Institute, please explain why not.

3.   What suggestions do you have for Summer Institute next year. This could include courses, activities, or speakers.

4.   What are some of the highlights that you remember about Summer Institute 2002?

please use additional paper if needed and thank you for your help.

Appendix 6.

The Secretary's Council review of their role in guiding LSTA program

The Secretary's Council on Library Development reviewed their role in the LSTA program at the December 2001 meeting. Three questions were posed for a discussion led by the Director of Reference Services of the State Library. The State Librarian and Library Development Director were not present for this discussion. Overall, the Council believes the work they do is important. The responses to the questions are summarized here.

1. *How does the Council feel about its role in advising on federal funds?*
   The Council feels they play an important and appropriate role in the program. They appreciate the Council's diversity, and feel that it brings in guidance from experience outside the library world.

2. *Does the Council have a good information basis for playing its role?*
   Council members responded that the staff did an excellent job of sharing information. They pointed out that information comes out in quarterly packets prior to meetings, and would prefer for more communication to take place in between meetings. Information received is sufficient for making policy decisions.

3. *Are there changes the Council would like to make?*
   Council members made several suggestions for improving the information flow. They would like to have grant project coordinators share with them the good outcomes and challenges of some of the individual projects. They expressed an interest in the State Library providing more support for grant application writers, such as giving feedback on unfunded proposals, and posting exemplary funded proposals as a model.

Appendix 7.

MPLD discussion on grant process

The Missouri Public Library Directors (MPLD) is a professional organization with about 75 members. They meet semi-annually to discuss library issues, and also maintain a listserv for discussion and sharing information. This group serves as a good sounding board for upcoming programs. The State Librarian regularly reports to them on State Library activities, and asks for input on all State Library programs, including the LSTA programs.

In December 2001 the MPLD members were invited to a discussion session on the State Library's administration of the LSTA program prior to their regular meeting. Approximately 25 library directors took part. A library director conducted the discussion, and no State Library staff was present. All of the libraries represented were recipients of an LSTA subgrant from the State Library at some time during this 5-year period. Four questions were posed for discussion, and the summary is given here. In the case of each question, the group was asked to say what worked well, and what needs improvement.

1. *In the communications from the State Library about the LSTA program, what worked well?*
   The text of messages by email and mail is clear, and grant guidelines are usually clear. Directors generally liked the use of the email list to post announcements.
   What needs improvement?
   Members made suggestions for improving the email communications processes being used by the State Library. These changes have been made. The State Librarian's report to the MPLD group should be sent out to all libraries, as not all can attend the meetings.

2. *In the application and project review process for the grant programs, what worked well?*
   Members liked the ability to print forms from the State Library web site. They also liked the simplified application forms for the Adaptive Equipment program, and would like to see more applications of that type. The grant review process is generally timely.
   What needs improvement?
   Directors recommended staggering deadlines for different kinds of grant applications. They would like more information on who is reviewing the grants, and the timeline for decisions, reports, and payment on grants. They would like to be able to fill out the applications and grant reports online.

3. *In the grant award, administrations, payment and reporting process for grants, what worked well?*
   The grant award packet is very good, containing all forms needed as well as a timeline for submission.
   What needs improvement?
   This question received many comments. The State of Missouri instituted a new online accounting system in the middle of the grant plan period. This system had a very steep learning curve for State Library and Secretary of State fiscal office staff. The system has a poor design for processing grants, and slows down the payment process. The accounting system also provides little information to the library about any electronically transmitted payments. In addition, the IMLS only allows drawdown of grant funds two times each month. These factors have combined to cause a high dissatisfaction level with the grant payment process. Turnover on State Library staff and the subsequent staff shortages and needs for retraining have also caused problems in handling grant administration in a timely and efficient way.

The MPLD members made recommendations for improvement of the payment and notification processes. Fiscal Office staffs have been making recommendations to the central administration for improvement in the payment system for over a year, but have been told that changes would not be made until a general system upgrade is completed. In the interim, State Library staffs have encouraged grantees to contact them with any questions, as staff can query the system to find payment status. In addition, when large numbers of payments are made, the list is posted to the website.

4. *In the help you received from the State Library staff for your grant, what worked well?*
Directors stated staff had been friendly and courteous in answering questions and resolving problems.
What needs improvement?
Suggestions were made to help inform libraries of the payment process and who to call with questions. Directors also said steps should be taken to eliminate negative effects of staff turnover, so essential functions can be continued.